insightrix

Our Future is Wide Open
Saskatchewan Industry and Resources Advertising Campaign
July 2003

Final Report

This report was compiled by Insightrix Research Services

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Executive Summary

This report summarizes the results of the Our Future is Wide Open Advertising Campaign Survey for Saskatchewan Industry and Resources. The survey has two major themes. First, the survey includes an in-depth section on campaign recall. This component of the survey is broken into two main sections, unaided recall and aided recall of the advertisements. Responses to this section of the survey provide feedback on the extent to which the Saskatchewan Our Future is Wide Open advertisements reached the targeted audience of business people in Alberta, Saskatchewan, British Columbia, and Ontario.

Secondly, the survey obtains the reactions of business people to the advertisements. Respondents have the opportunity to reflect on the advertisements and indicate what they liked or disliked about the ads. The respondents are also able to indicate what the ad was communicating and what impact the advertisement had on the respondent.

Responses to two of the survey questions have not been included in the final report because they contain information pertaining to third parties.

Response Rates and Representativeness

Insightrix utilized a database of 10,068 businesses in Ontario, Saskatchewan, Alberta, and British Columbia. Of these 10,068 contacts, Insightrix deemed 1035 to be unavailable[1] and 1306 contacts did not qualify (i.e. were not conducting business on an inter-provincial level). Of the total 7,727 potential respondents, 1639 completed the survey. Of the respondents who did not complete the survey, 3219 refused, 686 were sent an email invitation but never completed the survey, 610 offered a "soft" appointment, 144 started the survey but did not finish, and 1573 were never successfully contacted (e.g. busy signal, answering machine, no answer).

Demographics

Province
Respondents were targeted in particular sectors. Quotas were determined for each sector based on the number of companies in each of the provinces of Saskatchewan, Alberta, British Columbia, and Ontario. The number of respondents that completed the survey included 403 from British Columbia, 412 from Alberta, 424 from Saskatchewan, and 400 from Ontario. An additional 144 respondents started the survey but did not complete it.

Sector
As a percentage of total respondents, 23.8% of respondents indicated they compete in the general manufacturing sector, 21.7% of respondents indicated they compete in the advanced technology sector, 16.0% of respondents indicated they compete in the oil and gas sector, 11.2% of respondents indicated they compete in the financial sector, 10.7% of respondents indicated they compete in an "other" sector (sectors other than those targeted), 9.4% of respondents indicated they compete in the forestry sector, 3.8% of respondents indicated they compete in the agri-value sector, and 3.4% of respondents indicated they compete in the mining sector.

The highest proportion of British Columbia respondents was in the general manufacturing (26.8%) and the forestry sectors (22.8%). The highest proportion of Alberta respondents was in

[1] Unavailable is defined as a contact with an incorrect phone number, a phone number that is out of service, an error in the phone number, a phone number that is a fax or modem, or the individual is not capable of responding due to illness.

the oil and gas sector (45.9%). Of the total Saskatchewan respondents, the highest proportion were in the general manufacturing sector (26.9%) and of the total Ontario respondents, the highest proportion were in the advanced technology sector (30.3%).

Inter-provincial Experience
Respondents who conducted business on an inter-provincial level were targeted. As a percentage of the total respondents, 81.7% conducted business on an inter-provincial level and 18.3% of respondents did not conduct business on an inter-provincial level (these 366 respondents were excluded from the remainder of the survey with the exception of Saskatchewan respondents).

Approximately three quarters of the Saskatchewan businesses indicated they are conducting business on an inter-provincial level. Of Alberta respondents, 87.3% indicated conducting business on an inter-provincial level, followed by 81.7% of Ontario businesses, and 81.3% of British Columbia businesses.

By sector, the agri-value had the highest proportion of respondents conducting business on an inter-provincial level (92.1%), followed by general manufacturing (88.9%), oil and gas (87.6%), and advanced technology (87.6%). Respondents in the "other" sectors had the highest proportion of respondents NOT conducting business on an inter-provincial level (37.2%), followed by forestry (34.1%), and financial (26.2%).

Company Size
Respondents of particular employee size were targeted. Efforts were made to contact larger employers in each of the sectors in each of the provinces. As a result, 66.1% of respondents have more than 20 employees in their company, 14.7% have between 10 and 20 employees, and 13.6% have less than 10 employees in their company. By province, 82.4% of respondents in Alberta were of companies of more than 20 employees, followed by 69.1% of respondents in British Columbia, 67.5% of respondents in Ontario, and 45.8% of respondents in Saskatchewan.

Companies in the financial sector accounted for the highest proportion of respondents in the 500 or more category (18.1%). The mining sector accounted for highest proportion of companies with more than 20 employees (77.2%), followed by oil and gas (76.2%), general manufacturing (70.3%) and forestry (70.2%). The agri-value sector accounted for the highest proportion of companies with between 1 and 20 employees (61.1%) followed by the advanced technology sector (34.2%) and the "other" sector (37.5%).

Provinces Currently/Considering Doing Business In Saskatchewan

Of the Alberta respondents surveyed, 75.5% indicated doing business in Saskatchewan, followed by 41.4% of British Columbia respondents, and 36.8% of Ontario respondents. Ontario and Alberta contained the highest proportion of agri-value businesses (72.9%). British Columbia contained the highest proportion of forestry businesses (81.8%) and Alberta contained the highest proportion of oil and gas businesses (89.6%).

The province of Ontario had the highest proportion of respondents currently doing business in Manitoba (52.3%), Quebec (64.7%), Nova Scotia (41.1%), New Brunswick (35.8%), Newfoundland (30.5%), Prince Edward Island (27.7%), and Nunavut (16.5%). The province of Alberta had the highest proportion of respondents currently doing business in the Northwest Territories (27.0%) and the province of British Columbia had the highest proportion of respondents currently doing business in the Yukon (18.7%).

Respondents rated Saskatchewan the second most desirable province to do business with. A total of 27.7% of respondents rated Saskatchewan as a province they would consider doing business with. This result was second only to Alberta in which 35.7% of total respondents indicated they were interested in doing business in Alberta. British Columbia was considered by

25.5% of total respondents who are not currently doing business there, followed by 24.8% of respondents who indicated Manitoba.

Of the respondents who would consider doing business in Saskatchewan, 18.3% of Ontario respondents indicated they were interested, 15.7% of respondents from British Columbia indicated they would consider doing business in Saskatchewan, followed by 10.9% of respondents from Alberta.

The sectors with the highest proportion of respondents indicating they would consider Saskatchewan to do business in include advanced technology (16.2%), forestry (14.0%), and general manufacturing (12.3%).

Saskatchewan Experience

Of the respondents NOT from Saskatchewan, 23.4% have visited Saskatchewan for pleasure, 8.2% of respondents visited Saskatchewan for business, and 19.3% of respondents visited Saskatchewan for both pleasure and business. Another 49.1% of respondents have never visited Saskatchewan for business or pleasure.

By province surveyed, 15.8% of respondents from Ontario visited Saskatchewan for business and 19% visited Saskatchewan for pleasure. Of Alberta respondents, 45.5% visited Saskatchewan for business and 68.9% of respondents from Alberta visited Saskatchewan for pleasure. Of BC respondents, 20.6% visited Saskatchewan for business and 39.4% of respondents from BC visited Saskatchewan for pleasure. By sector, agri-value contained the highest proportion of respondents (excluding the "other" category) who visited Saskatchewan for work related reasons (13.7%).

Perceptions Prior to Aided Recall Questions

Overall Respondents

Of the total respondents surveyed, 64.8% of respondents agreed with the statement "Saskatchewan is dependent on a farm-based economy", 25% of respondents were neutral with the statement and 10.1% of respondents disagreed with the statement.

Of the total respondents surveyed, 52.6% of respondents agreed with the statement "Saskatchewan's economy is dependent on natural resources", 37.4% of respondents were neutral with the statement and 10% of respondents disagreed with the statement.

Of the total respondents surveyed, 14.5% of respondents agreed with the statement "Saskatchewan is a leader in technology and innovation", 44.9% of respondents were neutral, and 40.6% of respondents disagreed with the statement.

Of the total respondents surveyed, 37.3% of respondents agreed with the statement "Saskatchewan is diversifying its economy", 49.0% of respondents were neutral, and 13.7% of respondents disagreed with the statement.

Of the total respondents surveyed, 44.0% of respondents agreed with the statement "Saskatchewan has a skilled and educated workforce", 46.7% of respondents were neutral, and 9.2% of respondents disagreed with the statement.

Comparison of Provincial Weighted Averages

Overall, respondents had the lowest level of agreement with the statement "Saskatchewan is a leader in technology and innovation" with a rating of 2.7 out of 5 and the highest level of agreement with the statement "Saskatchewan is dependent on a farm based economy" with a rating of 3.7 out 5. By province, the view that Saskatchewan is dependent on a farm-based economy was highest on average among Ontario and British Columbia respondents with an agreement rating of 3.8 out of 5. This view was the lowest among Saskatchewan respondents with a rating of 3.6 out of 5.

The view that "Saskatchewan's economy is dependent on natural resources" was highest on average among Saskatchewan respondents with an agreement rating of 3.7 out of 5. The remaining provinces indicated a rating of 3.5 out of 5.

The view that "Saskatchewan is a leader in technology and innovation" was highest on average among Saskatchewan respondents with an agreement rating of 3.2 out of 5. This view was the lowest among Ontario respondents with a rating of 2.4 out of 5.

The view that "Saskatchewan is diversifying its economy" was highest on average among Saskatchewan respondents with an agreement rating of 3.4 out of 5. This view was the lowest among Alberta and Ontario respondents with a rating of 3.2 out of 5.

The view that "Saskatchewan has a skilled and educated workforce" was highest on average among Saskatchewan respondents with an agreement rating of 3.7 out of 5. This view was the lowest among Ontario and British Columbia respondents with a rating of 3.3 out of 5.

Advertising Recall

Provincial Advertising/Unaided Campaign Awareness

All survey respondents were asked "Have you recently heard or seen any advertising that promotes doing business in any of the following provinces?" When presented with a list of all the Canadian provinces and territories, 17.6% indicated hearing or seeing advertising that promotes doing business in Saskatchewan, 16.6% of total respondents indicated hearing or seeing advertising that promotes doing business in Ontario, 16.4% of total respondents indicated hearing or seeing advertising that promotes doing business in Alberta, and 12.0% of total respondents indicated hearing or seeing advertising that promotes doing business in British Columbia. Another 60.4% of total respondents did not recall hearing any advertising that promotes doing business in any of the Canadian provinces or territories.

Of the respondents who identified Saskatchewan from the list, 36.1% were interested in learning more about or are considering doing business in Saskatchewan. Of the respondents who had seen or heard advertising that promotes doing business in Alberta, 31.6% were interested in learning more about or considering doing business in Alberta.

By province that the respondent was located in, 39.8% of respondents in Alberta were interested in learning more about or considering doing business in Saskatchewan after seeing the ads, followed by 12.9% of respondents in British Columbia, and 11.2% of respondents in Ontario were interested in learning more about or considering doing business in Saskatchewan. Furthermore, of the total 137 respondents interested in learning more about Saskatchewan, 41% of the respondents (56 respondents) were not from Saskatchewan themselves.

By sector, over half of the respondents (52.7%) in the oil and gas sector were interested in learning more or considering doing business with Saskatchewan, followed by the financial sector (44.7%), the "other" sectors (40%), and advanced technology (36.9%).

Aided Campaign Awareness
When asked specifically if they recall hearing or seeing advertising that promotes doing business in Saskatchewan, 31.8% of respondents indicated they recalled hearing or seeing advertising that promotes doing business in Saskatchewan.

When asked specifically about Saskatchewan advertising, 68.7% of Saskatchewan respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan, 30.1% of Alberta respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan, 15% of British Columbia respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan, and 11.2% of Ontario respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan.

Slogan Awareness
When asked, "***Specifically, do you recall the "Saskatchewan - Our Future is Wide Open" campaign***?" 28.2% of total respondents indicated they did recall the slogan. By province, 67.7% of Saskatchewan respondents recalled the slogan, followed by 22.7% of Alberta respondents, 12.1% of British Columbia respondents, and 7.9% of Ontario respondents.

Combined Recall of Campaign

Combined recall for all of the provinces for the "Saskatchewan - Our Future is Wide Open" campaign is 42.8%. By province, combined recall is 25% of British Columbia respondents, 44% of Alberta respondents, 81% of Saskatchewan respondents, and 20% of Ontario respondents.

Advertising Media

Of the respondents who recalled the advertising, 54.6% indicated they saw the ad on television, 37% indicated newspaper (print), 19.6% indicated other, 9.8% indicated airport signage, 4.9% indicated the in-flight video, and 3.9% indicated newspaper (online). Another, 16.1% of respondents was not sure where they saw the advertising.

By province, Saskatchewan had the highest proportion of respondents who recalled the advertising in television (63.0%), newspaper (46.1%), other (27.5%), and newspaper online (6.0%). Alberta respondents had the highest proportion of respondents recalling the airport signage (10.9%) and British Columbia respondents had the highest proportion of respondents recalling the Air Canada in-flight service advertisement (12.7%).

Saskatchewan respondents indicated seeing or hearing the ads more frequently with 77.7% of Saskatchewan respondents indicating they saw or heard the ad at least 4 times, compared to 32.9% of Alberta respondents and 26.9% of Ontario respondents.

Of the total respondents who recalled the Saskatchewan advertising, 38.6% of respondents saw the ad 1 to 3 times, 26.8% of respondents saw the ad 4 to 10 times, and 25.6% of respondents saw the ad at least 10 times. Respondents from British Columbia recalled seeing the advertisement the least with 70.4% indicating between 1 to 3 times, compared to Saskatchewan respondents who recall seeing the advertisement the most with 47.4% indicating seeing the ad at least 10 times.

Globe and Mail Supplement

Of the total respondents surveyed, 18.4% of respondents indicated seeing the special supplement on Saskatchewan in the Globe and Mail in May. Ontario respondents were the most likely to recall the supplement (45.5%), followed by Alberta (21.6%), and British Columbia (20.7%).

Advertising Message

Of the respondents who recalled the advertising, the top three messages respondents believed that the advertising was trying to convey include: Saskatchewan is a great place to do business (66.5%), Saskatchewan is a great place to live (63.6%), Saskatchewan is rich in natural resources (33.8%).

Of the four provinces surveyed, a higher proportion of respondents in British Columbia indicated: Saskatchewan workers have a great attitude and strong work ethic (16.0%), Saskatchewan is an innovative and vibrant business environment (13.0%), and Saskatchewan is a province with advanced technologies (10.0%). A higher proportion of respondents in Saskatchewan indicated Saskatchewan is a good place to live (74.8%), Saskatchewan is a good place to do business (68.5%), and Saskatchewan is rich in natural resources (36.6). A higher proportion of respondents in Ontario indicated Saskatchewan has an educated and skilled workforce (18.3%), and Saskatchewan is predominately an agrarian economy (7.3%).

New Learning

Of the total respondents who recalled the advertising, 22.4% indicated learning something new about Saskatchewan. By province, 31.0% of British Columbia respondents indicated learning something new about Saskatchewan, followed by Ontario (24.4%), and Alberta (23.2%). By sector, 30% of the agri-value companies surveyed (6 respondents) indicated learning something new, followed by advanced technology (27.6%), and forestry (26.3%).

Furthermore, of the respondents who recalled the advertising, 26.4% of respondents indicated that the advertising piqued their interest to learn more about Saskatchewan. By province, respondents from Ontario were the most interested (30.5%) in learning more about Saskatchewan, followed by Alberta respondents (29.8%). By sector, respondents in the agri-value sector (35%) indicated the most interest in learning more about Saskatchewan, followed by the oil and gas sector (31.7%) and the advanced technology sector (31.0%).

Perceptions After Recall Questions

Of Respondents Who Recall the Advertising

Of the total respondents who recalled the advertising, 68.6% of respondents agreed that "Saskatchewan is a good place to live", 23.3% of respondents were undecided and 8.2% of respondents disagreed.

Of the respondents who recalled the advertising, 58.0% of respondents agreed that "Saskatchewan is a good place to do business", 32.0% of respondents were undecided and 10.0% of respondents disagreed.

Of the respondents who recalled the advertising, 83.6% of respondents agreed that "Saskatchewan is rich in natural resources", 15.1% of respondents are undecided, and 1.3% of respondents disagreed.

Of the respondents who recalled the advertising, 61.2% of respondents agreed with the statement "Saskatchewan workers have a great attitude and strong work ethic", 33.9% of respondents were undecided, and 5.0% of respondents disagreed.

Of the respondents who recalled the advertising, 61.4% of respondents agreed that "Saskatchewan has an educated and skilled workforce", 33.6% of respondents are undecided, and 5.1% of respondents disagreed with the statement. (Compared to the results reported earlier basis total respondents: Of the total respondents surveyed, 44.0% of respondents agreed that

Saskatchewan has a skilled and educated workforce, 46.7% of respondents were neutral, and 9.2% of respondents disagreed). Compared to the perceptions of the total respondents prior to the advertising recall questions, 17.4% additional respondents who saw the advertising have a more favorable view of Saskatchewan's workforce.

Of the respondents who recalled the advertising, 59.9% of respondents agreed that "Saskatchewan has a diverse economy", 30.1% of respondents are undecided, and 10.1% of respondents disagreed.

Of the respondents who recalled the advertising, 48.0% of respondents agreed that "Saskatchewan is an innovative and vibrant business environment", 37.6% of respondents are undecided, and 14.4% of respondents disagreed.

Of the respondents who recalled the advertising, 50.4% of respondents agreed that "Saskatchewan is a province with advanced technologies", 37.5% of respondents are undecided, and 12.0% of respondents disagreed.

Of the respondents who recalled the advertising, 47.1% of respondents agree that "Saskatchewan is predominantly an agrarian economy", 37.5% of respondents are undecided, and 15.4% of respondents disagreed.

Comparison of Provincial Weighted Averages

By province, Saskatchewan respondents agreed the most (4.3) with the statement "Saskatchewan is a good place to live", followed by Ontario (3.6), Alberta (3.5) and British Columbia (3.3).

Saskatchewan respondents agreed the most (3.7) with the statement "Saskatchewan is a good place to do business", followed by Ontario (3.6) and Alberta (3.6) and British Columbia (3.5).

Saskatchewan respondents agreed the most (4.3) with the statement "Saskatchewan is rich in natural resources", followed by Ontario (4.1), Alberta (4.0) and British Columbia (4.0).

Saskatchewan respondents agreed the most (3.8) with the statement "Saskatchewan workers have a great attitude and strong work ethic", followed by Ontario (3.6), Alberta (3.6) and British Columbia (3.6).

Saskatchewan respondents agree the most (3.8) with the statement "Saskatchewan has an educated and skilled workforce", followed by Alberta (3.6), Ontario (3.5) and British Columbia (3.5).

Saskatchewan respondents agree the most (3.8) with the statement "Saskatchewan has a diverse economy," followed by Alberta (3.5), British Columbia (3.5), and Ontario (3.4).

Agreement with the statement "Saskatchewan is an innovative and vibrant business environment" was the same for respondents in Saskatchewan (3.4) and British Columbia (3.4), followed by Alberta (3.3), and Ontario (3.3).

Saskatchewan respondents agree the most (3.7) with the statement "Saskatchewan is a province with advanced technologies", followed by Alberta (3.3), British Columbia (3.2), and Ontario (3.1).

Agreement with the statement "Saskatchewan is predominantly an agrarian economy" was greatest in Ontario (3.6), followed by Alberta (3.4), Saskatchewan (3.4) and British Columbia (3.3).

Attitude Change

Of the respondents who recalled the advertising, 46.6% of respondents indicated a more positive attitude towards Saskatchewan after viewing the advertising and 46.4% of respondents indicated their attitude remained the same after viewing the advertising. Another 1.5% indicated their attitude became more negative after viewing the advertising.

By province, 62.0% of Ontario respondents who viewed the ads, indicated their attitude towards Saskatchewan became more positive after viewing the advertising, followed by 53.5% of British Columbia respondents, 49.7% of Alberta respondents, and 39.1% of Saskatchewan respondents.

By sector, 62.2% of respondents in forestry indicated a more positive attitude toward Saskatchewan after viewing the advertising, followed by 52.2% of respondents in the mining sector, 50.0% in agri-value, 48.3% in financial, 47.9% in advanced technology, and 45.3% in general manufacturing.

Testimonials

Of the respondents who recalled the advertising, 42.4% of respondents indicated not having noticed the print ads featuring business executives' testimonials and 28.2% of respondents indicated they were more likely to believe the print ads featuring business executives' testimonials. Another 27.9% of respondents indicated the print ads featuring business executives' testimonials did not affect the believability of the ad, and 1.5% of respondents indicated they were less likely to believe the print ads.

Impact

Of the respondents who recalled the advertising and were NOT from Saskatchewan, 38.2% indicated they would be more likely to conduct business in Saskatchewan if the opportunity were presented. Another 59.5% indicated they were neutral towards conducting business in Saskatchewan if the opportunity were presented. Of those who recalled the advertising, 2.3% indicated a lesser likelihood of conducting business in Saskatchewan if the opportunity were presented.

By province, respondents from British Columbia indicated a greater likelihood (41.4%) of conducting business in Saskatchewan since seeing the ads, followed by Ontario (36.8%), and Alberta (35.3%). By sector, the financial sector indicated a greater likelihood (52.9%) of conducting business in Saskatchewan if the opportunity were presented followed by advanced technology (51.7%), general manufacturing (44.4%), and mining (44.4%).

Comparison to Industry Norms

Insightrix worked with Canwest Opinion Research, a nationally registered research company headquartered in Calgary to gather results from comparative studies to assess the advertising performance. In addition, Insightrix contacted agencies including Health Canada, non-profit advocacy groups, and other organizations that commonly undertake social marketing campaigns. These campaigns are similar to Our Future is Wide Open advertising in that the intent is to change attitudes and perceptions towards an issue.

An Interpretation of the Results

Recall

One of the key findings of this survey is that the combined recall for the "Saskatchewan - Our Future is Wide Open" campaign is 43%. By province, combined recall is 25% in British Columbia, 44% in Alberta, 81% in Saskatchewan, and 20% in Ontario.

Based on the national advertising efforts, this is deemed to be comparable to other studies' combined recall at 43%. Below is a summary of similar campaigns and their combined recall.

	Recall - Combined
National Advertising – Canadian Financial Institution	41%
National Advertising – Canadian Oil Company	44%
Average	42.5%

Another key finding of this survey is that the unaided recall for hearing or seeing advertising that promotes doing business in Saskatchewan is 18%. By province, unaided recall is 38% in Saskatchewan, 20% in Alberta, 7% in British Columbia, and 5% in Ontario.

Based on the national advertising efforts, this is deemed to be well above the average of 14% calculated from the following campaigns. Below is a summary of similar campaigns and their unaided recall.

	Recall - Unaided
IPSOS-ASI for Related Recall on Next* TV Recall	18%
National Advertising – Canadian Financial Institution	10%
National Advertising – Canadian Oil Company	11%
Canada: We All Belong	18%
Average	14.3%

Example of a Provincial Campaign:

SaskPower "Come Home Safe Tonight"	31.2%

Total aided recall of the campaign, including those that recalled the tagline, is 25% of respondents. By province, aided recall is 18% of British Columbia respondents, 24% of Alberta respondents, 43% of Saskatchewan respondents, and 15% of Ontario respondents.
Based on the national advertising efforts, this is below other studies' aided recall percentages.

	Recall - Aided
National Advertising – Canadian Financial Institution	39%
National Advertising – Canadian Oil Company	37%
Canada: We All Belong	32%
Average	36%

Learned something new from the advertising

Of the respondents that recalled the advertising, 22.4% indicated learning something new about Saskatchewan. By province, learning something new was reported by 31.0% of British Columbia respondents, followed by Ontario (24.4%), and Alberta (23.2%). By sector, 30% of the Agri-value companies surveyed (6 of 20 respondents) indicating learning something new, followed by Advanced Technology (27.6% - 40 of 145 respondents), and Forestry (26.3% - 10 of 38 respondents).

Based on the national advertising efforts, this is deemed to be well above that reported in other studies. In a National Advertising (of a National Advertising – Canadian Financial Institution) very similar to this campaign, the reported percentage is 8%.

Attitude Change/Impact as a result of the advertising

Of the respondents that recalled the advertising 46.6% of respondents indicated a more positive attitude towards Saskatchewan as a result of viewing the advertising and 46.4% of respondents indicated their attitude remained the same after viewing the advertising. Another 1.5% indicated their attitude become more negative as a result of viewing the advertising. The remaining 5.5% of respondents did not express an opinion.

Based on the national advertising efforts, this is deemed to be well above the industry average of 27.3%. Below is a summary of similar campaigns and their positive impact percentages.

	Positive Impact
National Advertising – Canadian Financial Institution	34%
Canada: We All Belong	30%
National Advertising – Canadian Oil Company	18%
Average	27.3%

1 Introduction and Methodology

1.1 Goals and Objectives

The purpose of this survey is to measure the impact of the *Our Future is Wide Open* national awareness campaign conducted from January to July 2003. The campaign consisted of weekly advertising placements in key national newspapers and their Web sites – including the Globe and Mail, National Post, Vancouver Sun, and Calgary Herald. As well, airport signage had been placed in airports of major cities including Vancouver, Calgary, Regina, Saskatoon, Winnipeg, Ottawa and Toronto. Television commercials were also placed on targeted business programming including CTV NewsNet, ROB TV, NewsWorld, as well as on Air Canada's in-flight television service. A limited media relations program had also been conducted.

The goals of the awareness campaign are as follows:

- Increase awareness of Saskatchewan as a good place to do business and invest.
- Increase awareness of competitive advantages in the province's six key economic sectors.
- Dispel stereotypes of Saskatchewan as a "have-not" province, primarily reliant on grain farming and mining.

The main objectives of the survey is to:

- Measure recall of Our Future is Wide Open national advertising and promotions.
- Measure impact on perception of Saskatchewan as a good place to do business and invest.
- Measure impact on opinion of Saskatchewan's competitiveness compared to other provinces.
- Determine effect on dispelling negative stereotypes of Saskatchewan.
- Determine what mediums and messages were most effective.

1.2 Scope of Work

Saskatchewan Industry and Resources contracted Insightrix to conduct a multimode survey of business executives/managers in British Columbia, Alberta, Saskatchewan and Ontario. Each business contacted met the qualifications of conducting business on a national level except for those companies from Saskatchewan. Sector specific survey groups targeted included general manufacturing, agri-value, advanced technology, forestry, mining, and oil and gas. Quotas were set for each sector to ensure that the results for each sector were statistically accurate.

Quotas were also set by employer size within each sector. Companies outside Saskatchewan that were targeted were those with greater than 100 employees and within Saskatchewan, companies with greater than 10 employees.

For Saskatchewan businesses, the restriction of conducting business on an inter-provincial level was removed. The purpose of surveying this group was to identify Saskatchewan business people's perception of the government advertising.

The survey was conducted using a multimode approach. The businesses were contacted by telephone and pre-notified about the survey. Each respondent was given the option of completing the survey over the phone, or online.

1.3 Survey Design

Insightrix worked with the Client and Canwest Opinion Research to develop a questionnaire ensuring structure and research questions led to desired results. Insightrix installed the survey on-line with a Review Function that allowed selected members to individually review the survey instrument and provide feedback.

1.4 Survey Distribution

Surveys were conducted online and by telephone. For the respondents who completed the survey online, each email was personalized, and included a cover letter asking for the individual's cooperation in completing the study. All respondents were also assured confidentiality in completing the survey.

2 Survey Results

2.1 Survey Completion Results

Insightrix utilized a database of 10,068 businesses in Ontario, Saskatchewan, Alberta, and British Columbia. The database of businesses was selected based upon targeted industry sectors, grouped by SIC codes, and divided by province. The database was further sub-divided based upon number of employees employed by those businesses.

Of the 10,068 contacts, Insightrix deemed 1035 to be unavailable[2] and 1306 contacts did not qualify (i.e. were not conducting business on an inter-provincial level). Of the total 7,727 potential respondents, 1639 completed the survey. Of the respondents who did not complete the survey, 3,219 refused, 686 were sent an email invitation but never completed the survey, 610 offered a "soft" appointment, 144 started the survey but did not finish, and 1,573 were never successfully contacted (e.g. busy signal, answering machine, no answer).

Table 1 breaks down the survey completion results by province. Data was collected from June 11 to June 27, 2003.

Table 1 - Completion results by province

Province	Total Complete	Email Completes	Phone Completes	Partial Completes	Contacted	Outstanding Invites	Soft Appt	Callbacks	Refused	Unavail	Not Qual.
BC	403	122	281	32	3108	221	180	414	1042	375	474
AB	412	206	206	36	2146	185	94	251	720	164	319
SK	424	138	286	41	1634	99	90	298	484	171	67
ON	400	113	287	35	3180	181	246	610	973	325	446
Total	**1,639**	**579**	**1,060**	**144**	**10,068**	**686**	**610**	**1,573**	**3219**	**1,035**	**1,306**

2.2 Confidence Intervals

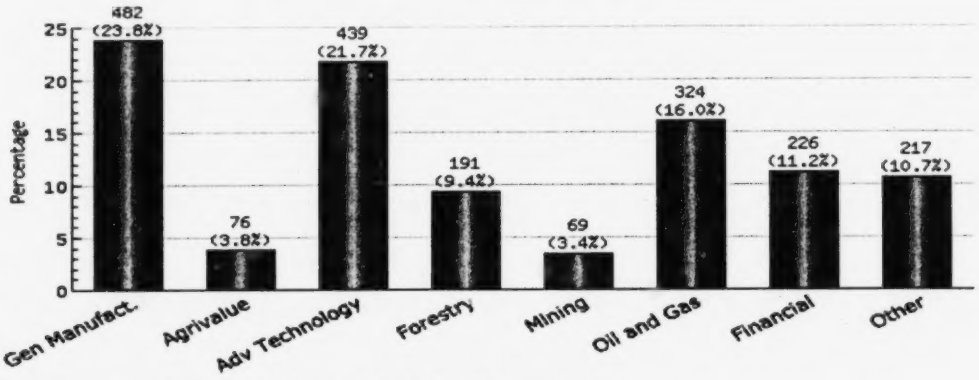
With the number of businesses in each province as the population, a sample of 400 businesses is required to have a confidence level of 95% and the confidence interval of 5.0%. This means that the reader can be 95% sure that the true percentage of the population is ±5.0% of the percentage being reported.

The sample was further stratified by the sector the respondent was classified within. With the number of businesses in each province by sector as the population, the sample of 400 businesses in each province was distributed over 8 sectors with each sector having an approximate confidence level of 90% and the confidence interval of 5.0%. This means that the reader can be 90% sure that the true percentage of the population is ±5.0% of the percentage being reported.

[2] Unavailable is defined as a contact with an incorrect phone number, a phone number that is out of service, an error in the phone number, a phone number that is a fax or modem, or the individual is not capable of responding due to illness.

2.3 *Survey Findings*

2.3.1 What is the key sector your company competes in?



2024 responses (excludes 38 "refused / don't know" responses)

Key Findings:

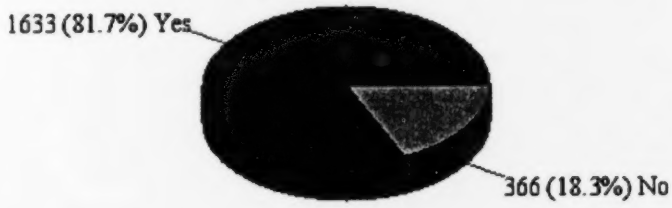
- 23.8% of respondents indicated they compete in the general manufacturing sector (23% excluding SK respondents)
- 21.7% of respondents indicated they compete in the advanced technology sector
- 16.0% of respondents indicated they compete in the oil and gas sector (16.6% excluding SK respondents)
- 11.2% of respondents indicated they compete in the financial sector (10.9% excluding SK respondents)
- 10.7% of respondents indicated they compete in an "other" sector (8.9% excluding SK respondents)
- 9.4% of respondents indicated they compete in the forestry sector (11.1% excluding SK respondents)
- 3.8% of respondents indicated they compete in the agri-value sector
- 3.4% of respondents indicated they compete in the mining sector (3.9% excluding SK respondents)

"Sector" **by** *"Province"*

	Totals	Gen Manufact.	Agri-value	Adv Technology	Forestry	Mining	Oil and Gas	Financial	Other
Totals	**2024 (100%)**	**482 (23.8%)**	**76 (3.8%)**	**439 (21.7%)**	**191 (9.4%)**	**69 (3.4%)**	**324 (16.0%)**	**226 (11.2%)**	**217 (10.7%)**
Total (w/o SK)	**1555 (100%)**	**358 (23.0%)**	**59 (3.8%)**	**339 (21.8%)**	**173 (11.1%)**	**61 (3.9%)**	**258 (16.6%)**	**169 (10.9%)**	**138 (8.9%)**
British Columbia	**522 (25.9%)**	140 (26.8%)	18 (3.4%)	101 (19.3%)	**119 (22.8%)**	15 (2.9%)	24 (4.6%)	65 (12.5%)	40 (7.7%)
Alberta	**508 (25.2%)**	76 (15.0%)	11 (2.2%)	79 (15.6%)	25 (4.9%)	7 (1.4%)	**233 (45.9%)**	34 (6.7%)	43 (8.5%)
Saskatchewan	**457 (22.7%)**	123 (26.9%)	17 (3.7%)	99 (21.7%)	11 (2.4%)	6 (1.3%)	66 (14.4%)	56 (12.3%)	**79 (17.3%)**
Ontario	**525 (26.1%)**	**142 (27.0%)**	**30 (5.7%)**	**159 (30.3%)**	29 (5.5%)	**39 (7.4%)**	1 (0.2%)	**70 (13.3%)**	55 (10.5%)

- Of the total British Columbia respondents, the highest proportion were in the general manufacturing (26.8%) and the forestry sectors (22.8%)
- Of the total Alberta respondents, the highest proportion were in the oil and gas sector (45.9%)
- Of the total Saskatchewan respondents, the highest proportion were in the general manufacturing sector (26.9%)
- Of the total Ontario respondents, the highest proportion were in the advanced technology sector (30.3%)

2.3.2 Do you conduct business on an inter-provincial level?



1999 responses

Key Findings:

- 81.7% of respondents conducted business on an inter-provincial level (83.4% excluding SK respondents)
- 18.3% of respondents did not conduct business on an inter-provincial level (these 366 respondents were excluded from the remainder of the survey with the exception of Saskatchewan respondents) (16.6% excluding SK respondents)

"Inter-provincial" **by** *"Province"*

	Totals	Yes	No
Overall Total	**1999 (100%)**	**1633 (81.7%)**	**366 (18.3%)**
Total (w/o SK)	**1546 (100%)**	**1289 (83.4%)**	**257 (16.6%)**
British Columbia	**518 (25.9%)**	421 (81.3%)	97 (18.7%)
Alberta	**504 (25.2%)**	**440 (87.3%)**	64 (12.7%)
Saskatchewan	**453 (22.7%)**	344 (75.9%)	**109 (24.1%)**
Ontario	**524 (26.2%)**	428 (81.7%)	96 (18.3%)

- Three quarters of the Saskatchewan businesses (75.9%) indicated conducting business on an inter-provincial level
- 87.3% of Alberta businesses indicated conducting business on an inter-provincial level
- 81.7% of Ontario businesses indicated conducting business on an inter-provincial level
- 81.3% of British Columbia businesses indicated conducting business on an inter-provincial level

"Inter-provincial" **by** *"Sector"*

	Totals	Yes	No
Totals	**1999 (100%)**	**1633 (81.7%)**	**366 (18.3%)**
General Manufacturing	**476 (23.8%)**	423 (88.9%)	53 (11.1%)
Agrivalue	**76 (3.8%)**	**70 (92.1%)**	6 (7.9%)
Advanced Technology	**436 (21.8%)**	382 (87.6%)	54 (12.4%)
Forestry	**179 (9.0%)**	118 (65.9%)	61 (34.1%)
Mining	**69 (3.5%)**	56 (81.2%)	13 (18.8%)
Oil and Gas	**323 (16.2%)**	283 (87.6%)	40 (12.4%)
Financial	**225 (11.3%)**	166 (73.8%)	59 (26.2%)
Other	**215 (10.8%)**	135 (62.8%)	**80 (37.2%)**

- The agri-value sector had the highest proportion of respondents conducting business on an inter-provincial level (92.1%), followed by general manufacturing (88.9%), oil and gas (87.6%), and advanced technology (87.6%)

- Respondents in the "other" sectors had the highest proportion of respondents NOT conducting business on an inter-provincial level (37.2%), followed by forestry (34.1%), and financial (26.2%)

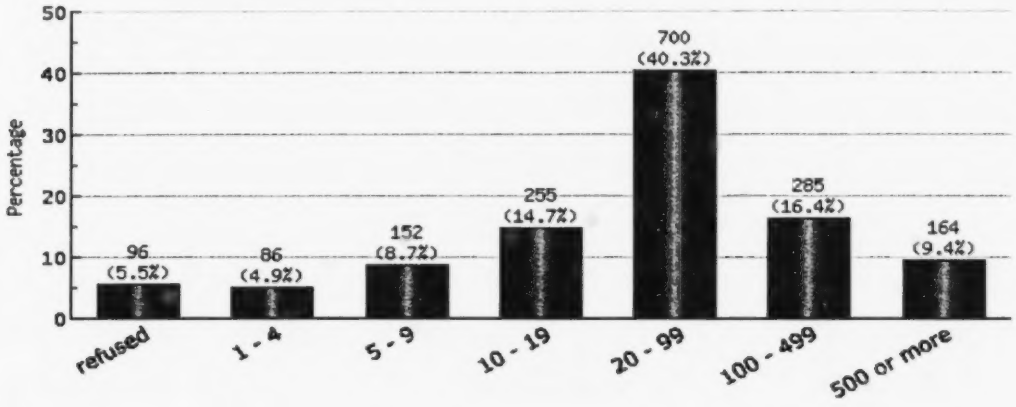
Excluding Saskatchewan Respondents

"Inter-provincial" **by** *"Sector"*

	Totals	Yes	No
Totals	**1546 (100%)**	**1289 (83.4%)**	**257 (16.6%)**
General Manufacturing	**354 (22.9%)**	317 (89.5%)	37 (10.5%)
Agrivalue	**59 (3.8%)**	**55 (93.2%)**	4 (6.8%)
Advanced Technology	**337 (21.8%)**	311 (92.3%)	26 (7.7%)
Forestry	**170 (11.0%)**	112 (65.9%)	58 (34.1%)
Mining	**63 (4.1%)**	51 (81.0%)	12 (19.0%)
Oil and Gas	**257 (16.6%)**	232 (90.3%)	25 (9.7%)
Financial	**169 (10.9%)**	131 (77.5%)	38 (22.5%)
Other	**137 (8.9%)**	80 (58.4%)	**57 (41.6%)**

- The agri-value sector had the highest proportion of respondents conducting business on an inter-provincial level (93.2%), followed by advanced technology (92.3%), oil and gas (90.3%), and general manufacturing (89.5%)
- Respondents in the "other" sectors had the highest proportion of respondents NOT conducting business on an inter-provincial level (41.6%), followed by forestry (34.1%), and financial (22.2%)

2.3.3 What is the total number of employees in your company?



1738 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Refused	96	5.5	5.5	1	96
1 - 4	86	4.9	10.5	2	172
5 - 9	152	8.7	19.2	3	456
10 - 19	255	14.7	33.9	4	1020
20 - 99	700	40.3	74.2	5	3500
100 - 499	285	16.4	90.6	6	1710
500 or more	164	9.4	100.0	7	1148
Total	**1738**	**100**			**8102**
Average					**4.7**

Key Findings:

- 66.1% of respondents have more than 20 employees in their company (73.3% excluding SK respondents)
- 14.7% of respondents have between 10 and 20 employees (15.3% excluding SK respondents)
- 13.6% of respondents have less than 10 employees in their company (6.3% excluding SK respondents)

"Number of Employees" **by** *"Province"*

	Totals	refused	1 - 4	5 - 9	10 - 19	20 - 99	100 - 499	500 or more
Totals	1738 (100%)	96 (5.5%)	86 (4.9%)	152 (8.7%)	255 (14.7%)	700 (40.3%)	285 (16.4%)	164 (9.4%)
Total (w/o SK)	1289 (100%)	65 (5.0%)	30 (2.3%)	52 (4.0%)	197 (15.3%)	565 (43.8%)	237 (18.4%)	143 (11.1%)
British Columbia	424 (24.4%)	25 (5.9%)	9 (2.1%)	18 (4.2%)	79 (18.6%)	178 (42.0%)	72 (17.0%)	43 (10.1%)
Alberta	441 (25.4%)	26 (5.9%)	4 (0.9%)	8 (1.8%)	40 (9.1%)	212 (48.1%)	96 (21.8%)	55 (12.5%)
Saskatchewan	445 (25.6%)	27 (6.1%)	56 (12.6%)	100 (22.5%)	58 (13.0%)	135 (30.3%)	48 (10.8%)	21 (4.7%)
Ontario	428 (24.6%)	18 (4.2%)	17 (4.0%)	26 (6.1%)	78 (18.2%)	175 (40.9%)	69 (16.1%)	45 (10.5%)

- 82.4% of respondents in Alberta were in companies of more than 20 employees
- 69.1% of respondents in British Columbia were in companies of more than 20 employees
- 67.5% of respondents in Ontario were in companies of more than 20 employees
- 45.8% of respondents in Saskatchewan were in companies of more than 20 employees

"Number of Employees" **by** *"Sector"*

	Totals	refused	1 - 4	5 - 9	10 - 19	20 - 99	100 - 499	500 or more
Overall Total	1738 (100%)	96 (5.5%)	86 (4.9%)	152 (8.7%)	255 (14.7%)	700 (40.3%)	285 (16.4%)	164 (9.4%)
General Manufacturing	438 (25.2%)	19 (4.3%)	18 (4.1%)	42 (9.6%)	51 (11.6%)	226 (51.6%)	68 (15.5%)	14 (3.2%)
Agri-value	72 (4.1%)	2 (2.8%)	5 (6.9%)	11 (15.3%)	28 (38.9%)	18 (25.0%)	6 (8.3%)	2 (2.8%)
Advanced Technology	410 (23.6%)	25 (6.1%)	22 (5.4%)	38 (9.3%)	80 (19.5%)	141 (34.4%)	58 (14.1%)	46 (11.2%)
Forestry	121 (7.0%)	6 (5.0%)	4 (3.3%)	5 (4.1%)	21 (17.4%)	47 (38.8%)	28 (23.1%)	10 (8.3%)
Mining	57 (3.3%)	3 (5.3%)	1 (1.8%)	3 (5.3%)	6 (10.5%)	22 (38.6%)	12 (21.1%)	10 (17.5%)
Oil and Gas	297 (17.1%)	16 (5.4%)	8 (2.7%)	22 (7.4%)	25 (8.4%)	141 (47.5%)	56 (18.9%)	29 (9.8%)
Financial	188 (10.8%)	13 (6.9%)	11 (5.9%)	12 (6.4%)	22 (11.7%)	62 (33.0%)	34 (18.1%)	34 (18.1%)
Other	155 (8.9%)	12 (7.7%)	17 (11.0%)	19 (12.3%)	22 (14.2%)	43 (27.7%)	23 (14.8%)	19 (12.3%)

- Companies in the financial sector accounted for the highest proportion of respondents in the 500 or more category (18.1%)
- The mining sector accounted for highest proportion of companies with more than 20 employees (77.2%), followed by oil and gas (76.2), forestry (70.2%), and general manufacturing (70.3%).
- The agri-value sector accounted for highest proportion of companies with between 1 and 20 employees (61.1%) followed by the advanced technology sector (34.2%) and the "other" sector (37.5%)

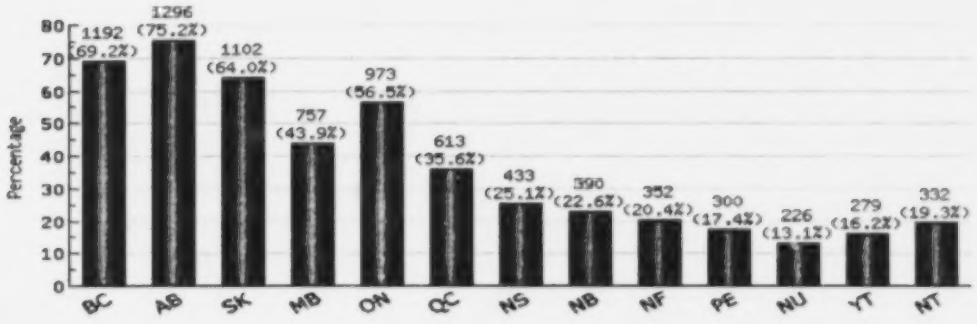
Excluding Saskatchewan Respondents

"Number of Employees" **by** *"Sector"*

	Totals	refused	1 - 4	5 - 9	10 - 19	20 - 99	100 - 499	500 or more
Totals	1289 (100%)	65 (5.0%)	30 (2.3%)	52 (4.0%)	197 (15.3%)	565 (43.8%)	237 (18.4%)	143 (11.1%)
General Manufacturing	318 (24.7%)	13 (4.1%)	10 (3.1%)	15 (4.7%)	38 (11.9%)	175 (55.0%)	54 (17.0%)	13 (4.1%)
Agrivalue	55 (4.3%)	2 (3.6%)	2 (3.6%)	7 (12.7%)	22 (40.0%)	15 (27.3%)	6 (10.9%)	1 (1.8%)
Advanced Technology	311 (24.1%)	19 (6.1%)	3 (1.0%)	17 (5.5%)	67 (21.5%)	119 (38.3%)	47 (15.1%)	39 (12.5%)
Forestry	113 (8.8%)	4 (3.5%)	4 (3.5%)	4 (3.5%)	21 (18.6%)	43 (38.1%)	27 (23.9%)	10 (8.8%)
Mining	49 (3.8%)	1 (2.0%)	1 (2.0%)	2 (4.1%)	4 (8.2%)	20 (40.8%)	11 (22.4%)	10 (20.4%)
Oil and Gas	233 (18.1%)	12 (5.2%)	2 (0.9%)	3 (1.3%)	20 (8.6%)	120 (51.5%)	50 (21.5%)	26 (11.2%)
Financial	132 (10.2%)	7 (5.3%)	6 (4.5%)	1 (0.8%)	13 (9.8%)	48 (36.4%)	29 (22.0%)	28 (21.2%)
Other	78 (6.1%)	7 (9.0%)	2 (2.6%)	3 (3.8%)	12 (15.4%)	25 (32.1%)	13 (16.7%)	16 (20.5%)

- Companies in the financial sector accounted for the highest proportion of respondents in the 500 or more category (21.2%)
- The oil and gas sector accounted for highest proportion of companies with more than 20 employees (84.2%), followed by mining (83.6), financial (79.6%), and general manufacturing (76.1%)
- The agri-value sector accounted for highest proportion of companies with between 1 and 20 employees (56.3%) followed by the advanced technology sector (28%) and the forestry sector (25.6%)

2.3.4 Which provinces are you currently doing business in, including the province in which you are located? (Check all that apply)



1723 responses

"Provinces Currently Doing Business In" **by** *"Province"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT
Overall Total	**1723 (100%)**	**1192 (69.2%)**	**1296 (75.2%)**	**1102 (64.0%)**	**757 (43.9%)**	**973 (56.5%)**	**613 (35.6%)**	**433 (25.1%)**	**390 (22.6%)**	**352 (20.4%)**	**300 (17.4%)**	**226 (13.1%)**	**279 (16.2%)**	**332 (19.3%)**
Total (w/o SK)	**1282 (100%)**	**1003 (78.2%)**	**1001 (78.1%)**	**661 (51.6%)**	**544 (42.4%)**	**826 (64.4%)**	**526 (41.0%)**	**368 (28.7%)**	**322 (25.1%)**	**300 (23.4%)**	**248 (19.3%)**	**179 (14.0%)**	**227 (17.7%)**	**275 (21.5%)**
British Columbia	**423 (24.6%)**	**423 (100.0%)**	329 (77.8%)	175 (41.4%)	160 (37.8%)	239 (56.5%)	155 (36.6%)	105 (24.8%)	103 (24.3%)	94 (22.2%)	77 (18.2%)	57 (13.5%)	**79 (18.7%)**	79 (18.7%)
Alberta	**440 (25.5%)**	352 (80.0%)	**440 (100.0%)**	332 (75.5%)	165 (37.5%)	168 (38.2%)	100 (22.7%)	91 (20.7%)	69 (15.7%)	78 (17.7%)	55 (12.5%)	53 (12.0%)	73 (16.6%)	**119 (27.0%)**
Saskatchewan	**441 (25.6%)**	189 (42.9%)	295 (66.9%)	**441 (100.0%)**	213 (48.3%)	147 (33.3%)	87 (19.7%)	65 (14.7%)	68 (15.4%)	52 (11.8%)	52 (11.8%)	47 (10.7%)	52 (11.8%)	57 (12.9%)
Ontario	**419 (24.3%)**	228 (54.4%)	232 (55.4%)	154 (36.8%)	**219 (52.3%)**	**419 (100.0%)**	**271 (64.7%)**	**172 (41.1%)**	**150 (35.8%)**	**128 (30.5%)**	**116 (27.7%)**	**69 (16.5%)**	75 (17.9%)	77 (18.4%)

Note: ***"Refused / don't know" responses are included in the "Totals" column.***

Key Findings:

- 75.5% of Alberta respondents indicated doing business in Saskatchewan
- 41.4% of British Columbia respondents indicated doing business with Saskatchewan
- 36.8% of Ontario respondents indicated doing business with Saskatchewan
- The province of Ontario had the highest proportion of respondents currently doing business in Manitoba (52.3%), Quebec (64.7%), Nova Scotia (41.1%), New Brunswick (35.8%), Newfoundland (30.5%), Prince Edward Island (27.7%), and Nunavut (16.5%)
- The province of Alberta had the highest proportion of respondents currently doing business in the Northwest Territories (27.0%)
- The province of British Columbia had the highest proportion of respondents currently doing business in the Yukon (18.7%)

"Provinces Currently Doing Business In" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT
Overall Total	**1723 (100%)**	**1192 (69.2%)**	**1296 (75.2%)**	**1102 (64.0%)**	**757 (43.9%)**	**973 (56.5%)**	**613 (35.6%)**	**433 (25.1%)**	**390 (22.6%)**	**352 (20.4%)**	**300 (17.4%)**	**226 (13.1%)**	**279 (16.2%)**	**332 (19.3%)**
General Manufacturing	**435 (25.2%)**	310 (71.3%)	334 (76.8%)	271 (62.3%)	238 (54.7%)	301 (69.2%)	187 (43.0%)	120 (27.6%)	119 (27.4%)	100 (23.0%)	90 (20.7%)	61 (14.0%)	83 (19.1%)	88 (20.2%)
Agri-value	**70 (4.1%)**	45 (64.3%)	51 (72.9%)	44 (62.9%)	**41 (58.6%)**	51 (72.9%)	34 (48.6%)	24 (34.3%)	22 (31.4%)	18 (25.7%)	18 (25.7%)	8 (11.4%)	9 (12.9%)	8 (11.4%)
Advanced Technology	**406 (23.6%)**	266 (65.5%)	281 (69.2%)	241 (59.4%)	182 (44.8%)	285 (70.2%)	182 (44.8%)	133 (32.8%)	118 (29.1%)	103 (25.4%)	95 (23.4%)	72 (17.7%)	82 (20.2%)	83 (20.4%)
Forestry	**121 (7.0%)**	**99 (81.8%)**	75 (62.0%)	31 (25.6%)	31 (25.6%)	56 (46.3%)	34 (28.1%)	8 (6.6%)	10 (8.3%)	7 (5.8%)	2 (1.7%)	2 (1.7%)	7 (5.8%)	5 (4.1%)
Mining	**54 (3.1%)**	34 (63.0%)	32 (59.3%)	23 (42.6%)	24 (44.4%)	**45 (83.3%)**	**30 (55.6%)**	15 (27.8%)	13 (24.1%)	11 (20.4%)	7 (13.0%)	9 (16.7%)	5 (9.3%)	9 (16.7%)
Oil and Gas	**297 (17.2%)**	202 (68.0%)	**266 (89.6%)**	234 (78.8%)	62 (20.9%)	47 (15.8%)	29 (9.8%)	33 (11.1%)	16 (5.4%)	30 (10.1%)	10 (3.4%)	8 (2.7%)	19 (6.4%)	59 (19.9%)
Financial	**187 (10.9%)**	138 (73.8%)	143 (76.5%)	132 (70.6%)	98 (52.4%)	111 (59.4%)	74 (39.6%)	**67 (35.8%)**	**60 (32.1%)**	**55 (29.4%)**	**53 (28.3%)**	**44 (23.5%)**	**47 (25.1%)**	**46 (24.6%)**
Other	**153 (8.9%)**	98 (64.1%)	114 (74.5%)	**126 (82.4%)**	81 (52.9%)	77 (50.3%)	43 (28.1%)	33 (21.6%)	32 (20.9%)	28 (18.3%)	25 (16.3%)	22 (14.4%)	27 (17.6%)	34 (22.2%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- Ontario and Alberta contained the highest proportion of agri-value business (72.9%)
- British Columbia contained the highest proportion of forestry business (81.8%)
- Alberta contained the highest proportion of oil and gas business (89.6%)

Excluding Saskatchewan Respondents

"Provinces Currently Doing Business In" **by** *"Sector"*

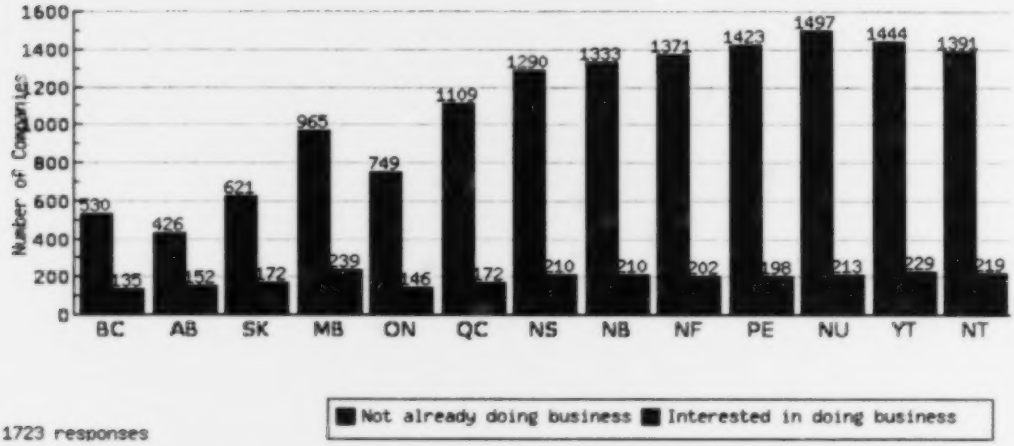
	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT
Totals	**1282 (100%)**	**1003 (78.2%)**	**1001 (78.1%)**	**661 (51.6%)**	**544 (42.4%)**	**826 (64.4%)**	**526 (41.0%)**	**368 (28.7%)**	**322 (25.1%)**	**300 (23.4%)**	**248 (19.3%)**	**179 (14.0%)**	**227 (17.7%)**	**275 (21.5%)**
General Manufacturing	**316 (24.6%)**	245 (77.5%)	241 (76.3%)	152 (48.1%)	158 (50.0%)	244 (77.2%)	149 (47.2%)	96 (30.4%)	92 (29.1%)	79 (25.0%)	68 (21.5%)	44 (13.9%)	63 (19.9%)	67 (21.2%)
Agrivalue	**53 (4.1%)**	33 (62.3%)	37 (69.8%)	27 (50.9%)	30 (56.6%)	44 (83.0%)	27 (50.9%)	20 (37.7%)	17 (32.1%)	14 (26.4%)	13 (24.5%)	5 (9.4%)	6 (11.3%)	5 (9.4%)
Advanced Technology	**309 (24.1%)**	231 (74.8%)	221 (71.5%)	144 (46.6%)	145 (46.9%)	252 (81.6%)	165 (53.4%)	118 (38.2%)	104 (33.7%)	93 (30.1%)	83 (26.9%)	62 (20.1%)	71 (23.0%)	72 (23.3%)
Forestry	**113 (8.8%)**	98 (86.7%)	71 (62.8%)	23 (20.4%)	29 (25.7%)	55 (48.7%)	33 (29.2%)	7 (6.2%)	9 (8.0%)	6 (5.3%)	2 (1.8%)	2 (1.8%)	7 (6.2%)	5 (4.4%)
Mining	**48 (3.7%)**	30 (62.5%)	28 (58.3%)	17 (35.4%)	19 (39.6%)	**41 (85.4%)**	**27 (56.3%)**	13 (27.1%)	10 (20.8%)	10 (20.8%)	7 (14.6%)	7 (14.6%)	4 (8.3%)	7 (14.6%)
Oil and Gas	**233 (18.2%)**	186 (79.8%)	**229 (98.3%)**	**170 (73.0%)**	43 (18.5%)	44 (18.9%)	26 (11.2%)	30 (12.9%)	14 (6.0%)	29 (12.4%)	9 (3.9%)	7 (3.0%)	16 (6.9%)	55 (23.6%)
Financial	**132 (10.3%)**	**116 (87.9%)**	110 (83.3%)	77 (58.3%)	**76 (57.6%)**	98 (74.2%)	68 (51.5%)	**61 (46.2%)**	**53 (40.2%)**	**49 (37.1%)**	**48 (36.4%)**	**39 (29.5%)**	**42 (31.8%)**	**41 (31.1%)**
Other	**78 (6.1%)**	64 (82.1%)	64 (82.1%)	51 (65.4%)	44 (56.4%)	48 (61.5%)	31 (39.7%)	23 (29.5%)	23 (29.5%)	20 (25.6%)	18 (23.1%)	13 (16.7%)	18 (23.1%)	23 (29.5%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- Ontario and Alberta contained the highest proportion of agri-value business with 83.0% and 69.8% respectively
- British Columbia contained the highest proportion of forestry business (86.7%)
- Alberta contained the highest proportion of oil and gas business (98.3%)

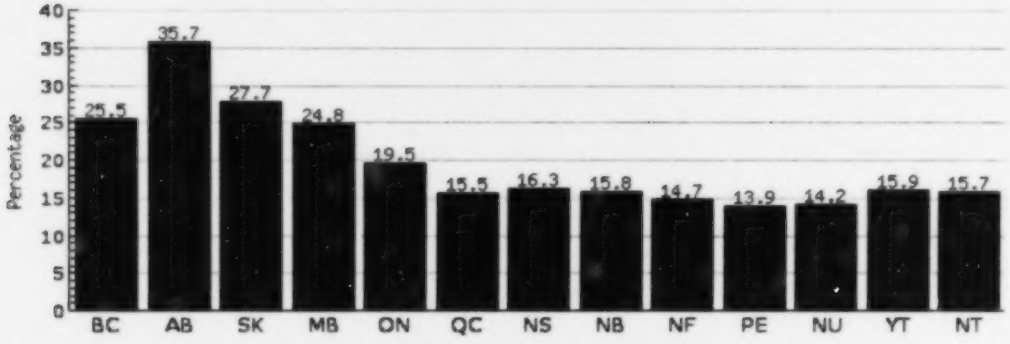
2.3.5 In which provinces would you consider doing business in? (i.e. relocating, expanding, purchasing from or investing in) (Check all that apply)

Number of Companies



1723 responses

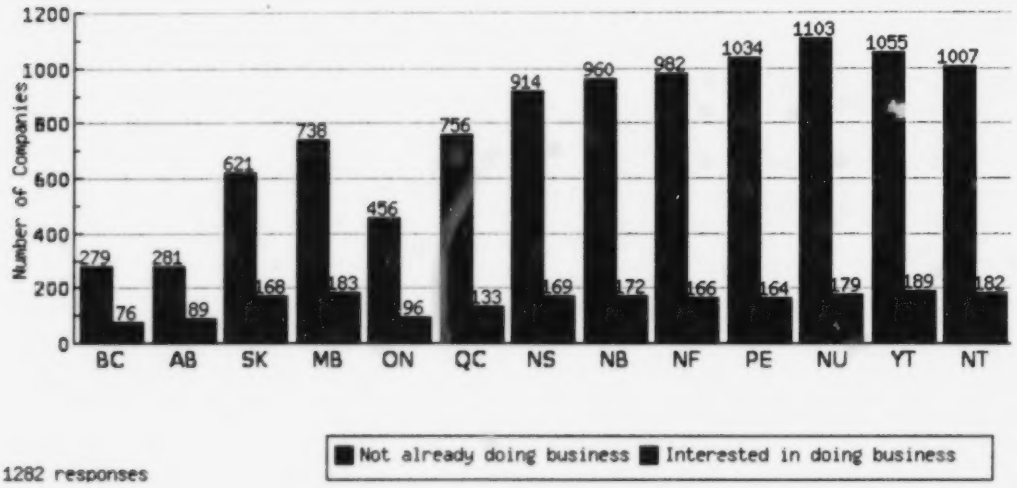
Percentage of companies that are not yet currently doing business in each province but interested in doing so.



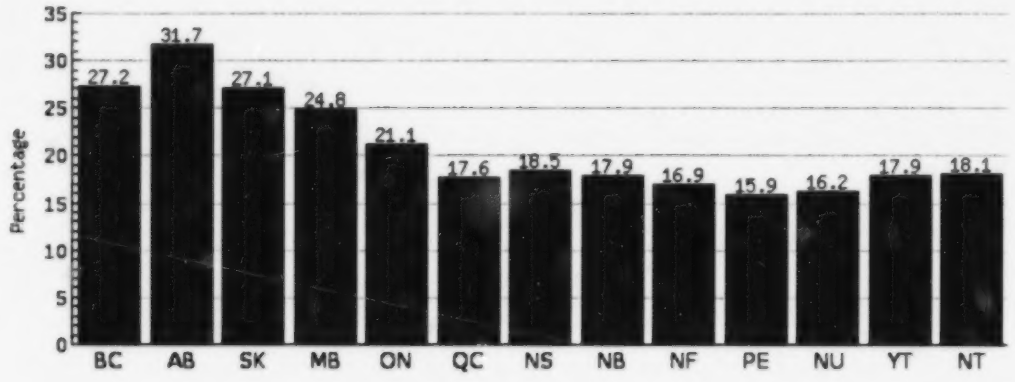
Key Findings:

- 35.7% of respondents indicated that they would consider doing business in Alberta (31.7% excluding SK respondents)
- 27.7% of respondents indicated that they would consider doing business in the Saskatchewan (27.1% excluding SK respondents)
- 25.5% of respondents indicated that they would consider doing business in the British Columbia (27.2% excluding SK respondents)
- 24.8% of respondents indicated that they would consider doing business in Manitoba

Excluding SK Respondents:



1282 responses



"Provinces Considering Doing Business In" by **"Province"**

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Totals	1543 (100%)	135 (8.7%)	152 (9.9%)	172 (11.1%)	239 (15.5%)	146 (9.5%)	172 (11.1%)	210 (13.6%)	210 (13.6%)	202 (13.1%)	198 (12.8%)	213 (13.8%)	229 (14.8%)	219 (14.2%)	942 (61.0%)
Totals (w/o SK)	1132 (100%)	76 (6.7%)	89 (7.9%)	168 (14.8%)	183 (16.2%)	96 (8.5%)	133 (11.7%)	169 (14.9%)	172 (15.2%)	166 (14.7%)	164 (14.5%)	179 (15.8%)	189 (16.7%)	182 (16.1%)	684 (60.4%)
British Columbia	369 (23.9%)	1 (0.3%)	42 (11.4%)	58 (15.7%)	52 (14.1%)	37 (10.0%)	48 (13.0%)	57 (15.4%)	55 (14.9%)	51 (13.8%)	50 (13.6%)	55 (14.9%)	59 (16.0%)	58 (15.7%)	231 (62.6%)
Alberta	402 (26.1%)	32 (8.0%)	1 (0.2%)	44 (10.9%)	76 (18.9%)	57 (14.2%)	47 (11.7%)	55 (13.7%)	56 (13.9%)	53 (13.2%)	52 (12.9%)	61 (15.2%)	67 (16.7%)	62 (15.4%)	242 (60.2%)
Saskatchewan	411 (26.6%)	59 (14.4%)	63 (15.3%)	4 (1.0%)	56 (13.6%)	50 (12.2%)	39 (9.5%)	41 (10.0%)	38 (9.2%)	36 (8.8%)	34 (8.3%)	34 (8.3%)	40 (9.7%)	37 (9.0%)	258 (62.8%)
Ontario	361 (23.4%)	43 (11.9%)	46 (12.7%)	66 (18.3%)	55 (15.2%)	2 (0.6%)	38 (10.5%)	57 (15.8%)	61 (16.9%)	62 (17.2%)	62 (17.2%)	63 (17.5%)	63 (17.5%)	62 (17.2%)	211 (58.4%)

Note: ***"Refused / don't know" responses are included in the "Totals" column.***

- 15.7% of respondents from British Columbia indicated they would consider doing business in Saskatchewan
- 10.9% of respondents from Alberta indicated they would consider doing business in Saskatchewan
- 18.3% of respondents from Ontario indicated they would consider doing business in Saskatchewan (the highest of all other provinces)

"Provinces Considering Doing Business In" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Overall Totals	1543 (100%)	135 (8.7%)	152 (9.9%)	172 (11.1%)	239 (15.5%)	146 (9.5%)	172 (11.1%)	210 (13.6%)	210 (13.6%)	202 (13.1%)	198 (12.8%)	213 (13.8%)	229 (14.8%)	219 (14.2%)	942 (61.0%)
General Manufacturing	382 (24.8%)	30 (7.9%)	31 (8.1%)	47 (12.3%)	54 (14.1%)	34 (8.9%)	43 (11.3%)	55 (14.4%)	54 (14.1%)	52 (13.6%)	51 (13.4%)	56 (14.7%)	58 (15.2%)	55 (14.4%)	256 (67.0%)
Agri-value	62 (4.0%)	7 (11.3%)	2 (3.2%)	4 (6.5%)	7 (11.3%)	7 (11.3%)	9 (14.5%)	9 (14.5%)	7 (11.3%)	6 (9.7%)	6 (9.7%)	7 (11.3%)	9 (14.5%)	8 (12.9%)	35 (56.5%)
Advanced Technology	352 (22.8%)	39 (11.1%)	51 (14.5%)	57 (16.2%)	72 (20.5%)	30 (8.5%)	48 (13.6%)	62 (17.6%)	65 (18.5%)	62 (17.6%)	66 (18.8%)	64 (18.2%)	63 (17.9%)	65 (18.5%)	193 (54.8%)
Forestry	114 (7.4%)	4 (3.5%)	20 (17.5%)	16 (14.0%)	13 (11.4%)	9 (7.9%)	9 (7.9%)	9 (7.9%)	10 (8.8%)	8 (7.0%)	9 (7.9%)	9 (7.9%)	9 (7.9%)	9 (7.9%)	70 (61.4%)
Mining	49 (3.2%)	4 (8.2%)	11 (22.4%)	5 (10.2%)	7 (14.3%)	1 (2.0%)	5 (10.2%)	7 (14.3%)	8 (16.3%)	10 (20.4%)	7 (14.3%)	9 (18.4%)	12 (24.5%)	9 (18.4%)	30 (61.2%)
Oil and Gas	287 (18.6%)	28 (9.8%)	14 (4.9%)	24 (8.4%)	52 (18.1%)	38 (13.2%)	22 (7.7%)	29 (10.1%)	29 (10.1%)	29 (10.1%)	24 (8.4%)	33 (11.5%)	42 (14.6%)	37 (12.9%)	165 (57.5%)
Financial	158 (10.2%)	11 (7.0%)	11 (7.0%)	12 (7.6%)	18 (11.4%)	13 (8.2%)	17 (10.8%)	17 (10.8%)	18 (11.4%)	18 (11.4%)	16 (10.1%)	17 (10.8%)	14 (8.9%)	17 (10.8%)	107 (67.7%)
Other	139 (9.0%)	12 (8.6%)	12 (8.6%)	7 (5.0%)	16 (11.5%)	14 (10.1%)	19 (13.7%)	22 (15.8%)	19 (13.7%)	17 (12.2%)	19 (13.7%)	18 (12.9%)	22 (15.8%)	19 (13.7%)	86 (61.9%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- The sectors with the highest proportion of respondents indicating they would consider Saskatchewan to do business in include advanced technology (16.2%), forestry (14.0%), and general manufacturing (12.3%)

Excluding SK Respondents

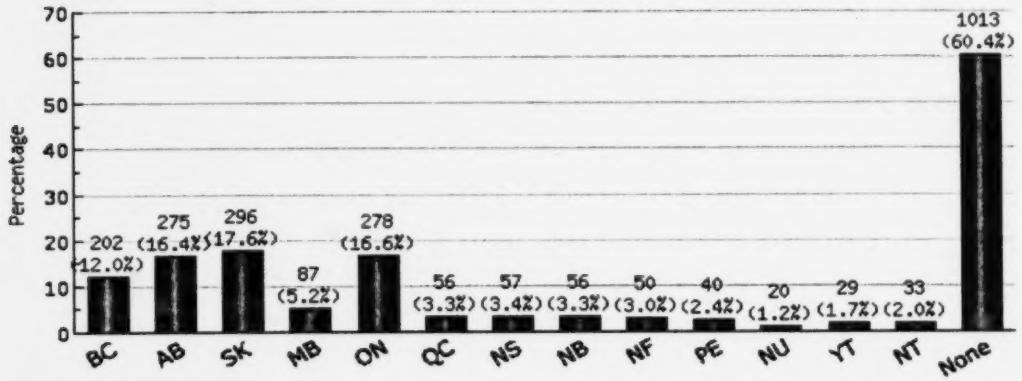
"Provinces Considering Doing Business In" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Totals	**1132 (100%)**	**76 (6.7%)**	**89 (7.9%)**	**168 (14.8%)**	**183 (16.2%)**	**96 (8.5%)**	**133 (11.7%)**	**169 (14.9%)**	**172 (15.2%)**	**166 (14.7%)**	**164 (14.5%)**	**179 (15.8%)**	**189 (16.7%)**	**182 (16.1%)**	**684 (60.4%)**
General Manufacturing	**275 (24.3%)**	18 (6.5%)	22 (8.0%)	47 (17.1%)	42 (15.3%)	21 (7.6%)	31 (11.3%)	46 (16.7%)	46 (16.7%)	44 (16.0%)	44 (16.0%)	47 (17.1%)	46 (16.7%)	45 (16.4%)	181 (65.8%)
Agri-value	**48 (4.2%)**	**5 (10.4%)**	0 (0.0%)	4 (8.3%)	5 (10.4%)	5 (10.4%)	7 (14.6%)	8 (16.7%)	6 (12.5%)	5 (10.4%)	5 (10.4%)	6 (12.5%)	8 (16.7%)	7 (14.6%)	29 (60.4%)
Advanced Technology	**260 (23.0%)**	24 (9.2%)	30 (11.5%)	**57 (21.9%)**	**52 (20.0%)**	18 (6.9%)	**42 (16.2%)**	**56 (21.5%)**	**59 (22.7%)**	**56 (21.5%)**	**60 (23.1%)**	**57 (21.9%)**	56 (21.5%)	**58 (22.3%)**	134 (51.5%)
Forestry	**106 (9.4%)**	2 (1.9%)	19 (17.9%)	15 (14.2%)	13 (12.3%)	9 (8.5%)	9 (8.5%)	9 (8.5%)	10 (9.4%)	8 (7.5%)	9 (8.5%)	9 (8.5%)	8 (7.5%)	8 (7.5%)	66 (62.3%)
Mining	**43 (3.8%)**	3 (7.0%)	**9 (20.9%)**	5 (11.6%)	7 (16.3%)	0 (0.0%)	3 (7.0%)	5 (11.6%)	6 (14.0%)	8 (18.6%)	5 (11.6%)	8 (18.6%)	**10 (23.3%)**	8 (18.6%)	27 (62.8%)
Oil and Gas	**225 (19.9%)**	18 (8.0%)	3 (1.3%)	24 (10.7%)	**45 (20.0%)**	**32 (14.2%)**	20 (8.9%)	26 (11.6%)	27 (12.0%)	26 (11.6%)	23 (10.2%)	30 (13.3%)	39 (17.3%)	33 (14.7%)	130 (57.8%)
Financial	**106 (9.4%)**	4 (3.8%)	4 (3.8%)	12 (11.3%)	13 (12.3%)	7 (6.6%)	14 (13.2%)	12 (11.3%)	12 (11.3%)	13 (12.3%)	11 (10.4%)	16 (15.1%)	13 (12.3%)	16 (15.1%)	69 (65.1%)
Other	**69 (6.1%)**	2 (2.9%)	2 (2.9%)	4 (5.8%)	6 (8.7%)	4 (5.8%)	7 (10.1%)	7 (10.1%)	6 (8.7%)	6 (8.7%)	7 (10.1%)	6 (8.7%)	9 (13.0%)	7 (10.1%)	**48 (69.6%)**

***Note:** "Refused / don't know" responses are included in the "Totals" column.*

- The sectors with the highest proportion of respondents indicating they would consider Saskatchewan to do business in include advanced technology (21.9%), general manufacturing (17.1%), and forestry (14.2%)

2.3.6 Have you recently heard or seen any advertising that promotes doing business in any of the following provinces?



1678 responses

Key Findings:

- 17.6% of the total respondents indicated hearing or seeing advertising that promotes doing business in Saskatchewan (10.8% excluding SK respondents)
- 16.6% of total respondents indicated hearing or seeing advertising that promotes doing business in Ontario (17.6% excluding SK respondents)
- 16.4% of total respondents indicated hearing or seeing advertising that promotes doing business in Alberta (15.3% excluding SK respondents)
- 12.0% of total respondents indicated hearing or seeing advertising that promotes doing business in British Columbia (14.1% excluding SK respondents)
- 60.4% of total respondents did not recall seeing or hearing any advertising that promotes doing business in any of the Canadian provinces (64.4% excluding SK respondents)

"Provinces Seen Advertising For" **by** *"Province"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Overall Totals	**1678 (100%)**	**202 (12.0%)**	**275 (16.4%)**	**296 (17.6%)**	**87 (5.2%)**	**278 (16.6%)**	**56 (3.3%)**	**57 (3.4%)**	**56 (3.3%)**	**50 (3.0%)**	**40 (2.4%)**	**20 (1.2%)**	**29 (1.7%)**	**33 (2.0%)**	**1013 (60.4%)**
Total (w/o SK)	**1244 (100%)**	**176 (14.1%)**	**189 (15.2%)**	**134 (10.8%)**	**53 (4.3%)**	**219 (17.6%)**	**52 (4.2%)**	**46 (3.7%)**	**50 (4.0%)**	**46 (3.7%)**	**34 (2.7%)**	**17 (1.4%)**	**27 (2.2%)**	**31 (2.5%)**	**801 (64.4%)**
British Columbia	**409 (24.4%)**	69 (16.9%)	66 (16.1%)	30 (7.3%)	16 (3.9%)	47 (11.5%)	4 (1.0%)	9 (2.2%)	8 (2.0%)	6 (1.5%)	5 (1.2%)	5 (1.2%)	9 (2.2%)	9 (2.2%)	**278 (68.0%)**
Alberta	**425 (25.3%)**	**72 (16.9%)**	**91 (21.4%)**	82 (19.3%)	22 (5.2%)	44 (10.4%)	12 (2.8%)	18 (4.2%)	17 (4.0%)	20 (4.7%)	11 (2.6%)	**7 (1.6%)**	**13 (3.1%)**	**16 (3.8%)**	271 (63.8%)
Saskatchewan	**434 (25.9%)**	26 (6.0%)	86 (19.8%)	**162 (37.3%)**	**34 (7.8%)**	59 (13.6%)	4 (0.9%)	11 (2.5%)	6 (1.4%)	4 (0.9%)	6 (1.4%)	3 (0.7%)	2 (0.5%)	2 (0.5%)	212 (48.8%)
Ontario	**410 (24.4%)**	35 (8.5%)	32 (7.8%)	22 (5.4%)	15 (3.7%)	**128 (31.2%)**	**36 (8.8%)**	**19 (4.6%)**	**25 (6.1%)**	**20 (4.9%)**	**18 (4.4%)**	5 (1.2%)	5 (1.2%)	6 (1.5%)	252 (61.5%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- 19.3% of respondents in Alberta recalled hearing or seeing Saskatchewan advertising, this is followed by 7.3% of British Columbia respondents and 5.4% of Ontario respondents

- 19.8% of respondents in Saskatchewan recalled hearing or seeing Alberta advertising, followed by 16.1% of respondents in British Columbia who recall hearing or seeing Alberta advertising and 7.8% of respondents in Ontario who recall hearing or seeing Alberta advertising

"Provinces Seen Advertising For" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Overall Total	**1678 (100%)**	**202 (12.0%)**	**275 (16.4%)**	**296 (17.6%)**	**87 (5.2%)**	**278 (16.6%)**	**56 (3.3%)**	**57 (3.4%)**	**56 (3.3%)**	**50 (3.0%)**	**40 (2.4%)**	**20 (1.2%)**	**29 (1.7%)**	**33 (2.0%)**	**1013 (60.4%)**
General Manufacturing	**427 (25.4%)**	34 (8.0%)	65 (15.2%)	68 (15.9%)	23 (5.4%)	73 (17.1%)	12 (2.8%)	13 (3.0%)	10 (2.3%)	10 (2.3%)	8 (1.9%)	4 (0.9%)	6 (1.4%)	5 (1.2%)	275 (64.4%)
Agri-value	**68 (4.1%)**	5 (7.4%)	12 (17.6%)	13 (19.1%)	**5 (7.4%)**	15 (22.1%)	3 (4.4%)	1 (1.5%)	1 (1.5%)	0 (0.0%)	1 (1.5%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	38 (55.9%)
Advanced Technology	**394 (23.5%)**	43 (10.9%)	54 (13.7%)	58 (14.7%)	21 (5.3%)	76 (19.3%)	20 (5.1%)	16 (4.1%)	17 (4.3%)	19 (4.8%)	13 (3.3%)	6 (1.5%)	8 (2.0%)	9 (2.3%)	239 (60.7%)
Forestry	**114 (6.8%)**	18 (15.8%)	22 (19.3%)	9 (7.9%)	3 (2.6%)	12 (10.5%)	1 (0.9%)	2 (1.8%)	4 (3.5%)	1 (0.9%)	2 (1.8%)	1 (0.9%)	2 (1.8%)	2 (1.8%)	**77 (67.5%)**
Mining	**53 (3.2%)**	7 (13.2%)	6 (11.3%)	9 (17.0%)	2 (3.8%)	**16 (30.2%)**	**4 (7.5%)**	**3 (5.7%)**	**4 (7.5%)**	**4 (7.5%)**	2 (3.8%)	**2 (3.8%)**	1 (1.9%)	2 (3.8%)	30 (56.6%)
Oil and Gas	**287 (17.1%)**	**48 (16.7%)**	**63 (22.0%)**	**69 (24.0%)**	15 (5.2%)	30 (10.5%)	6 (2.1%)	10 (3.5%)	7 (2.4%)	8 (2.8%)	5 (1.7%)	5 (1.7%)	**7 (2.4%)**	**11 (3.8%)**	173 (60.3%)
Financial	**183 (10.9%)**	27 (14.8%)	34 (18.6%)	39 (21.3%)	12 (6.6%)	34 (18.6%)	6 (3.3%)	7 (3.8%)	9 (4.9%)	5 (2.7%)	**7 (3.8%)**	2 (1.1%)	4 (2.2%)	3 (1.6%)	100 (54.6%)
Other	**152 (9.1%)**	20 (13.2%)	19 (12.5%)	31 (20.4%)	6 (3.9%)	22 (14.5%)	4 (2.6%)	5 (3.3%)	4 (2.6%)	3 (2.0%)	2 (1.3%)	0 (0.0%)	1 (0.7%)	1 (0.7%)	81 (53.3%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- 24% of the respondents in the oil and gas sector recalled Saskatchewan advertising
- 21.3% of respondents in the financial sector recalled Saskatchewan advertising
- 19.1% of respondents in the agri-value sector recalled Saskatchewan advertising
- 17.0% of respondents in the mining sector recalled Saskatchewan advertising
- 15.9% of respondents in the general manufacturing sector recalled Saskatchewan advertising

Excluding Saskatchewan Respondents

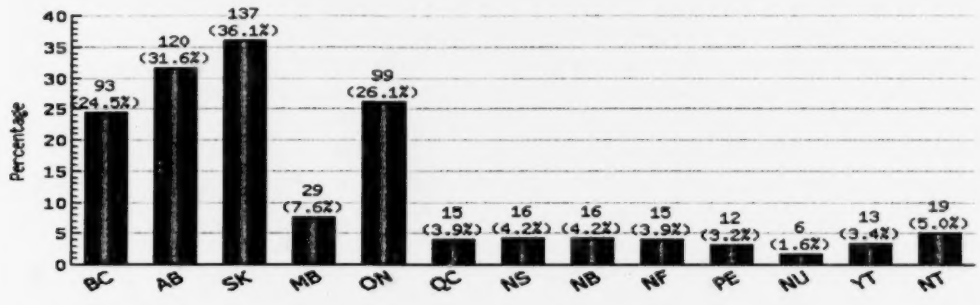
"Provinces Seen Advertising For" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Totals	**1244 (100%)**	**176 (14.1%)**	**189 (15.2%)**	**134 (10.8%)**	**53 (4.3%)**	**219 (17.6%)**	**52 (4.2%)**	**46 (3.7%)**	**50 (4.0%)**	**46 (3.7%)**	**34 (2.7%)**	**17 (1.4%)**	**27 (2.2%)**	**31 (2.5%)**	**801 (64.4%)**
General Manufacturing	**310 (24.9%)**	30 (9.7%)	38 (12.3%)	25 (8.1%)	12 (3.9%)	53 (17.1%)	10 (3.2%)	10 (3.2%)	8 (2.6%)	8 (2.6%)	5 (1.6%)	3 (1.0%)	5 (1.6%)	4 (1.3%)	**217 (70.0%)**
Agrivalue	**51 (4.1%)**	4 (7.8%)	7 (13.7%)	4 (7.8%)	2 (3.9%)	11 (21.6%)	3 (5.9%)	1 (2.0%)	1 (2.0%)	0 (0.0%)	1 (2.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	32 (62.7%)
Advanced Technology	**299 (24.0%)**	35 (11.7%)	35 (11.7%)	30 (10.0%)	12 (4.0%)	62 (20.7%)	19 (6.4%)	12 (4.0%)	14 (4.7%)	17 (5.7%)	12 (4.0%)	5 (1.7%)	7 (2.3%)	8 (2.7%)	190 (63.5%)
Forestry	**106 (8.5%)**	18 (17.0%)	21 (19.8%)	8 (7.5%)	3 (2.8%)	12 (11.3%)	1 (0.9%)	2 (1.9%)	4 (3.8%)	1 (0.9%)	2 (1.9%)	1 (0.9%)	2 (1.9%)	2 (1.9%)	71 (67.0%)
Mining	**47 (3.8%)**	6 (12.8%)	5 (10.6%)	5 (10.6%)	1 (2.1%)	**14 (29.8%)**	**4 (8.5%)**	**3 (6.4%)**	**4 (8.5%)**	**4 (8.5%)**	**2 (4.3%)**	**2 (4.3%)**	1 (2.1%)	2 (4.3%)	28 (59.6%)
Oil and Gas	**225 (18.1%)**	**46 (20.4%)**	**52 (23.1%)**	**45 (20.0%)**	10 (4.4%)	23 (10.2%)	6 (2.7%)	10 (4.4%)	7 (3.1%)	8 (3.6%)	5 (2.2%)	4 (1.8%)	**7 (3.1%)**	**11 (4.9%)**	140 (62.2%)
Financial	**129 (10.4%)**	22 (17.1%)	22 (17.1%)	15 (11.6%)	**10 (7.8%)**	29 (22.5%)	6 (4.7%)	5 (3.9%)	9 (7.0%)	5 (3.9%)	5 (3.9%)	2 (1.6%)	4 (3.1%)	3 (2.3%)	78 (60.5%)
Other	**77 (6.2%)**	15 (19.5%)	9 (11.7%)	2 (2.6%)	3 (3.9%)	15 (19.5%)	3 (3.9%)	3 (3.9%)	3 (3.9%)	3 (3.9%)	2 (2.6%)	0 (0.0%)	1 (1.3%)	1 (1.3%)	45 (58.4%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- 20% of the respondents in the oil and gas sector recalled Saskatchewan advertising
- 11.6% of respondents in the financial sector recalled Saskatchewan advertising
- 10.6% of respondents in the mining sector recalled Saskatchewan advertising
- 8.1% of respondents in the general manufacturing sector recalled Saskatchewan advertising
- 7.8% of respondents in the agri-value sector recalled Saskatchewan advertising

2.3.7 Of those, please check the provinces whose messages caused you to want to learn more about, or consider doing business with them.



380 responses

Key Findings:

- 36.1% of the respondents that had seen or heard advertising that promotes doing business in Saskatchewan, were interested in learning more about or considering doing business in Saskatchewan (22.2% excluding SK respondents)
- 31.6% of the respondents that had seen or heard advertising that promotes doing business in Alberta, were interested in learning more about or considering doing business in Alberta (29.8% excluding SK respondents)

"Wanted to Learn More About Province" **by** *"Province"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Totals	**380 (100%)**	**93 (24.5%)**	**120 (31.6%)**	**137 (36.1%)**	**29 (7.6%)**	**99 (26.1%)**	**15 (3.9%)**	**16 (4.2%)**	**16 (4.2%)**	**15 (3.9%)**	**12 (3.2%)**	**6 (1.6%)**	**13 (3.4%)**	**19 (5.0%)**	**0 (0.0%)**
Total (w/o SK)	**252 (100%)**	**83 (32.9%)**	**75 (29.8%)**	**56 (22.2%)**	**15 (6.0%)**	**83 (32.9%)**	**15 (6.0%)**	**16 (6.3%)**	**15 (6.0%)**	**15 (6.0%)**	**11 (4.4%)**	**6 (2.4%)**	**13 (5.2%)**	**19 (7.5%)**	**0 (0.0%)**
British Columbia	**70 (18.4%)**	**33 (47.1%)**	23 (32.9%)	9 (12.9%)	5 (7.1%)	12 (17.1%)	1 (1.4%)	2 (2.9%)	2 (2.9%)	3 (4.3%)	1 (1.4%)	1 (1.4%)	2 (2.9%)	5 (7.1%)	0 (0.0%)
Alberta	**93 (24.5%)**	29 (31.2%)	**41 (44.1%)**	37 (39.8%)	6 (6.5%)	12 (12.9%)	2 (2.2%)	7 (7.5%)	5 (5.4%)	**7 (7.5%)**	4 (4.3%)	2 (2.2%)	**8 (8.6%)**	**10 (10.8%)**	0 (0.0%)
Saskatchewan	**128 (33.7%)**	10 (7.8%)	45 (35.2%)	**81 (63.3%)**	**14 (10.9%)**	16 (12.5%)	0 (0.0%)	0 (0.0%)	1 (0.8%)	0 (0.0%)	1 (0.8%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Ontario	**89 (23.4%)**	21 (23.6%)	11 (12.4%)	10 (11.2%)	4 (4.5%)	**59 (66.3%)**	**12 (13.5%)**	**7 (7.9%)**	**8 (9.0%)**	5 (5.6%)	**6 (6.7%)**	**3 (3.4%)**	3 (3.4%)	4 (4.5%)	0 (0.0%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

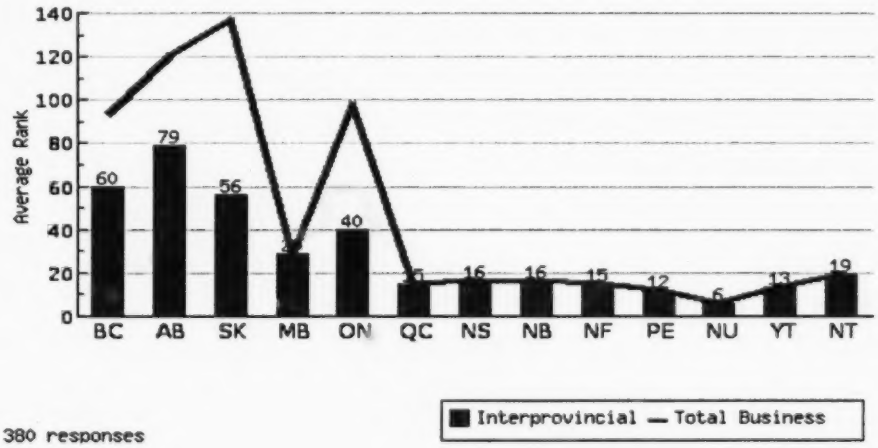
- 39.8% of respondents in Alberta were interested in learning more about or considering doing business in Saskatchewan
- 12.9% of respondents in British Columbia were interested in learning more about or considering doing business in Saskatchewan
- 11.2% of respondents in Ontario were interested in learning more about or considering doing business in Saskatchewan

"Wanted to Learn More About Province" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Overall Total	380 (100%)	93 (24.5%)	120 (31.6%)	137 (36.1%)	29 (7.6%)	99 (26.1%)	15 (3.9%)	16 (4.2%)	16 (4.2%)	15 (3.9%)	12 (3.2%)	6 (1.6%)	13 (3.4%)	19 (5.0%)	0 (0.0%)
General Manufacturing	87 (22.9%)	19 (21.8%)	30 (34.5%)	22 (25.3%)	7 (8.0%)	33 (37.9%)	4 (4.6%)	6 (6.9%)	3 (3.4%)	5 (5.7%)	2 (2.3%)	2 (2.3%)	3 (3.4%)	3 (3.4%)	0 (0.0%)
Agri-value	19 (5.0%)	4 (21.1%)	8 (42.1%)	4 (21.1%)	1 (5.3%)	6 (31.6%)	1 (5.3%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Advanced Technology	84 (22.1%)	23 (27.4%)	22 (26.2%)	31 (36.9%)	**8 (9.5%)**	25 (29.8%)	5 (6.0%)	4 (4.8%)	5 (6.0%)	4 (4.8%)	4 (4.8%)	2 (2.4%)	5 (6.0%)	5 (6.0%)	0 (0.0%)
Forestry	27 (7.1%)	**10 (37.0%)**	**12 (44.4%)**	6 (22.2%)	1 (3.7%)	5 (18.5%)	1 (3.7%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (3.7%)	0 (0.0%)	0 (0.0%)	1 (3.7%)	0 (0.0%)
Mining	11 (2.9%)	2 (18.2%)	2 (18.2%)	2 (18.2%)	1 (9.1%)	**7 (63.6%)**	**2 (18.2%)**	1 (9.1%)	**3 (27.3%)**	1 (9.1%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (9.1%)	0 (0.0%)
Oil and Gas	74 (19.5%)	21 (28.4%)	26 (35.1%)	**39 (52.7%)**	6 (8.1%)	8 (10.8%)	2 (2.7%)	4 (5.4%)	2 (2.7%)	5 (6.8%)	3 (4.1%)	**2 (2.7%)**	**5 (6.8%)**	**8 (10.8%)**	0 (0.0%)
Financial	38 (10.0%)	7 (18.4%)	10 (26.3%)	17 (44.7%)	3 (7.9%)	7 (18.4%)	0 (0.0%)	1 (2.6%)	3 (7.9%)	0 (0.0%)	**2 (5.3%)**	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Other	40 (10.5%)	7 (17.5%)	10 (25.0%)	16 (40.0%)	2 (5.0%)	8 (20.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (2.5%)	0 (0.0%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- Over half of the respondents (52.7%) in the oil and gas sector were interested in learning more or considering doing business with Saskatchewan, followed by the financial sector (44.7%), other (40%), and advanced technology (36.9%)



380 responses

- 41% of the respondents (56 respondents) who indicated they would like to learn more about Saskatchewan were not from Saskatchewan themselves

Excluding Saskatchewan Respondents:

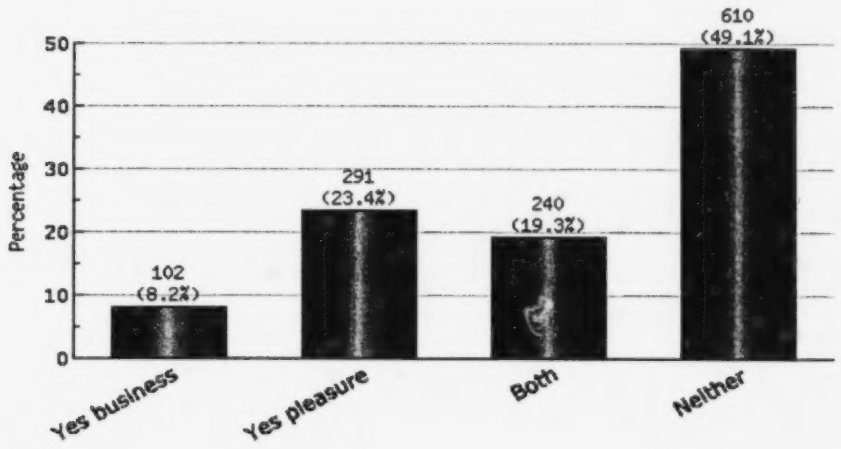
"Wanted to Learn More About Province" **by** *"Sector"*

	Totals	BC	AB	SK	MB	ON	QC	NS	NB	NF	PE	NU	YT	NT	None
Totals	**252 (100%)**	**83 (32.9%)**	**75 (29.8%)**	**56 (22.2%)**	**15 (6.0%)**	**83 (32.9%)**	**15 (6.0%)**	**16 (6.3%)**	**15 (6.0%)**	**15 (6.0%)**	**11 (4.4%)**	**6 (2.4%)**	**13 (5.2%)**	**19 (7.5%)**	**0 (0.0%)**
General Manufacturing	**53 (21.0%)**	17 (32.1%)	16 (30.2%)	8 (15.1%)	4 (7.5%)	24 (45.3%)	4 (7.5%)	**6 (11.3%)**	3 (5.7%)	5 (9.4%)	2 (3.8%)	**2 (3.8%)**	3 (5.7%)	3 (5.7%)	0 (0.0%)
Agrivalue	**13 (5.2%)**	4 (30.8%)	4 (30.8%)	2 (15.4%)	0 (0.0%)	5 (38.5%)	1 (7.7%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Advanced Technology	**58 (23.0%)**	20 (34.5%)	13 (22.4%)	13 (22.4%)	4 (6.9%)	21 (36.2%)	5 (8.6%)	4 (6.9%)	4 (6.9%)	4 (6.9%)	**4 (6.9%)**	2 (3.4%)	5 (8.6%)	5 (8.6%)	0 (0.0%)
Forestry	**25 (9.9%)**	**10 (40.0%)**	**11 (44.0%)**	5 (20.0%)	1 (4.0%)	5 (20.0%)	1 (4.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (4.0%)	0 (0.0%)	0 (0.0%)	1 (4.0%)	0 (0.0%)
Mining	**9 (3.6%)**	1 (11.1%)	1 (11.1%)	0 (0.0%)	0 (0.0%)	**6 (66.7%)**	**2 (22.2%)**	1 (11.1%)	**3 (33.3%)**	1 (11.1%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (11.1%)	0 (0.0%)
Oil and Gas	**57 (22.6%)**	21 (36.8%)	22 (38.6%)	**24 (42.1%)**	4 (7.0%)	8 (14.0%)	2 (3.5%)	4 (7.0%)	2 (3.5%)	5 (8.8%)	3 (5.3%)	2 (3.5%)	**5 (8.8%)**	**8 (14.0%)**	0 (0.0%)
Financial	**21 (8.3%)**	5 (23.8%)	4 (19.0%)	4 (19.0%)	**2 (9.5%)**	7 (33.3%)	0 (0.0%)	1 (4.8%)	3 (14.3%)	0 (0.0%)	1 (4.8%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Other	**16 (6.3%)**	5 (31.3%)	4 (25.0%)	0 (0.0%)	0 (0.0%)	7 (43.8%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)	1 (6.3%)	0 (0.0%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- 42.1% in the oil and gas sector were interested in learning more or considering doing business with Saskatchewan, followed by the advanced technology sector (22.4%), forestry (20%), and financial (19%)

2.3.8 Have you personally visited Saskatchewan for business or pleasure?



1243 responses

Key Findings:

- 23.4% of respondents have visited Saskatchewan for pleasure
- 8.2% of respondents have visited Saskatchewan for business
- 19.3% of respondents have visited Saskatchewan for both pleasure and business
- 49.1% of respondents have never visited Saskatchewan for business or pleasure

"Visited SK" **by** *"Province"*

	Totals	Yes business	Yes pleasure	Both	Neither
Overall Total	**1243 (100%)**	**102 (8.2%)**	**291 (23.4%)**	**240 (19.3%)**	**610 (49.1%)**
British Columbia	**409 (32.9%)**	33 (8.1%)	110 (26.9%)	51 (12.5%)	215 (52.6%)
Alberta	**424 (34.1%)**	32 (7.5%)	**131 (30.9%)**	**161 (38.0%)**	100 (23.6%)
Saskatchewan	**0 (0.0%)**	0 (0.0%)	0 (0.0%)	0 (0.0%)	0 (0.0%)
Ontario	**410 (33.0%)**	**37 (9.0%)**	50 (12.2%)	28 (6.8%)	**295 (72.0%)**

- 15.8% of respondents from Ontario visited Saskatchewan for business (includes responses classified as both)
- 19% of respondents form Ontario visited Saskatchewan for pleasure (includes responses classified as both)
- 45.5% of respondents from Alberta visited Saskatchewan for business (includes responses classified as both)
- 68.9% of respondents from Alberta visited Saskatchewan for pleasure (includes responses classified as both)
- 20.6% of respondents from BC visited Saskatchewan for business (includes responses classified as both)
- 39.4% of respondents from BC visited Saskatchewan for pleasure (includes responses classified as both)

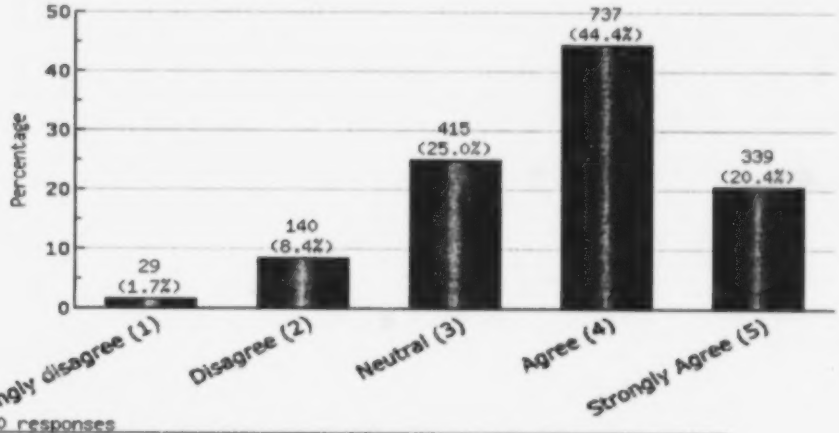
"Visited SK" **by** *"Sector"*

	Totals	Yes business	Yes pleasure	Both	Neither
Overall Total	**1243 (100%)**	**102 (8.2%)**	**291 (23.4%)**	**240 (19.3%)**	**610 (49.1%)**
General Manufacturing	**310 (24.9%)**	26 (8.4%)	71 (22.9%)	48 (15.5%)	165 (53.2%)
Agri-value	**51 (4.1%)**	7 (13.7%)	7 (13.7%)	9 (17.6%)	28 (54.9%)
Advanced Technology	**299 (24.1%)**	23 (7.7%)	52 (17.4%)	39 (13.0%)	185 (61.9%)
Forestry	**106 (8.5%)**	7 (6.6%)	25 (23.6%)	13 (12.3%)	61 (57.5%)
Mining	**47 (3.8%)**	1 (2.1%)	7 (14.9%)	8 (17.0%)	**31 (66.0%)**
Oil and Gas	**224 (18.0%)**	14 (6.3%)	**74 (33.0%)**	**92 (41.1%)**	44 (19.6%)
Financial	**129 (10.4%)**	12 (9.3%)	31 (24.0%)	19 (14.7%)	67 (51.9%)
Other	**77 (6.2%)**	**12 (15.6%)**	24 (31.2%)	12 (15.6%)	29 (37.7%)

- The agri-value sector contained the highest proportion of respondents (excluding the other category) who visited Saskatchewan for work related reasons (13.7%)

2.3.9 Please indicate your impression of Saskatchewan overall, by agreeing or disagreeing with the following statements using a 5-point scale where "1" is strongly disagree and "5" is strongly agree.

2.3.9.1 Saskatchewan is dependent on a farm-based economy



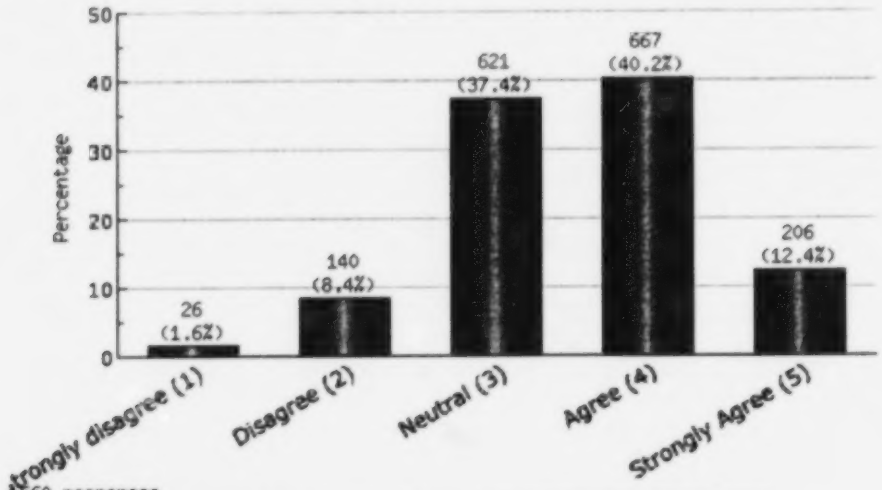
1660 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	29	1.7	1.7	1	29
Disagree (2)	140	8.4	10.2	2	280
Neutral (3)	415	25.0	35.2	3	1245
Agree (4)	737	44.4	79.6	4	2948
Strongly Agree (5)	339	20.4	100.0	5	1695
Total	**1660**	**100**			**6197**
Average					**3.7**

Key Findings:

- 64.8% of respondents agreed that Saskatchewan is dependent on a farm-based economy (67.3% excluding Saskatchewan respondents)
- 25% of respondents were neutral that Saskatchewan is dependent on a farm-based economy (25.1% excluding Saskatchewan respondents)
- 10.1% of respondents disagreed that Saskatchewan is dependent on a farm-based economy (7.6% excluding Saskatchewan respondents)

2.3.9.2 Saskatchewan's economy is dependent on natural resources.



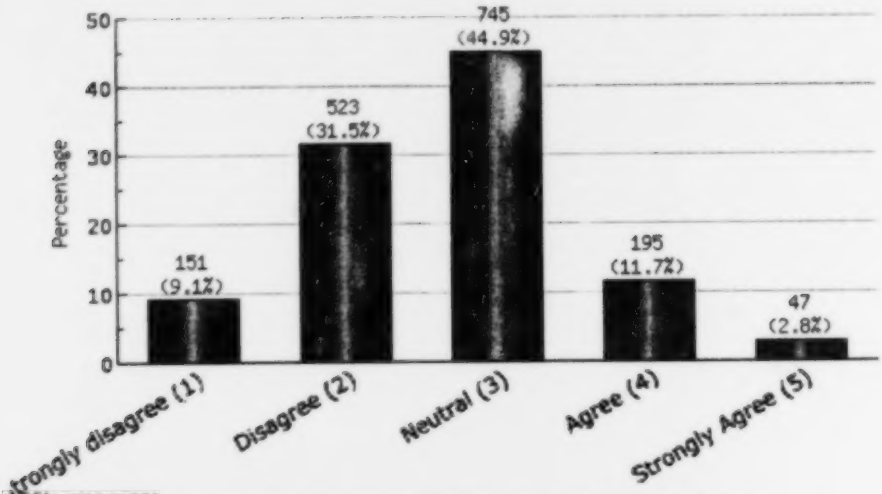
1660 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	26	1.6	1.6	1	26
Disagree (2)	140	8.4	10.0	2	280
Neutral (3)	621	37.4	47.4	3	1863
Agree (4)	667	40.2	87.6	4	2668
Strongly Agree (5)	206	12.4	100.0	5	1030
Total	**1660**	**100**			**5867**
Average					**3.5**

Key Findings:

- 52.6% of respondents agreed that Saskatchewan's economy is dependent on natural resources (50% excluding Saskatchewan respondents)
- 37.4% of respondents were neutral that Saskatchewan's economy is dependent on natural resources (39.4% excluding Saskatchewan respondents)
- 10% of respondents disagreed that that Saskatchewan's economy is dependent on natural resources (10.5% excluding Saskatchewan respondents)

2.3.9.3 Saskatchewan is a leader in technology and innovation



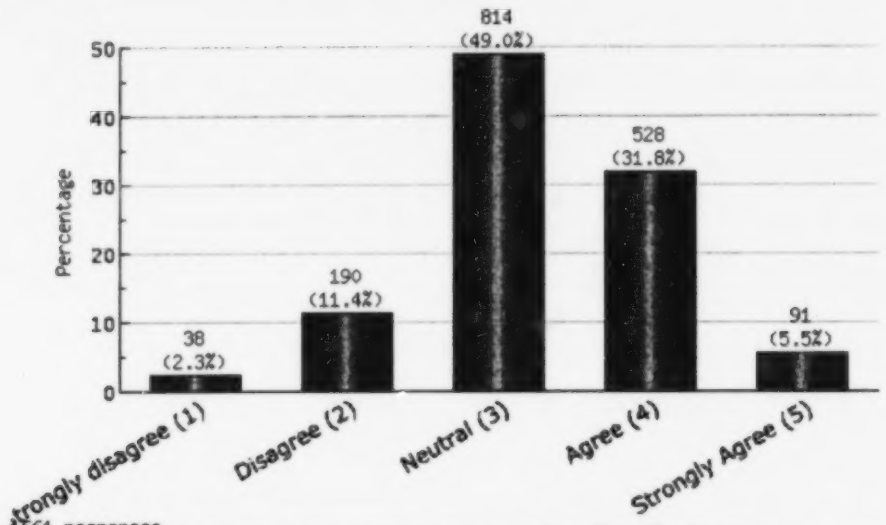
1661 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	151	9.1	9.1	1	151
Disagree (2)	523	31.5	40.6	2	1046
Neutral (3)	745	44.9	85.4	3	2235
Agree (4)	195	11.7	97.2	4	780
Strongly Agree (5)	47	2.8	100.0	5	235
Total	**1661**	**100**			**4447**
Average					**2.7**

Key Findings:

- 14.5% of respondents agreed that Saskatchewan is a leader in technology and innovation (4.9% excluding Saskatchewan respondents)
- 44.9% of respondents were neutral that Saskatchewan is a leader in technology and innovation (48.7% excluding Saskatchewan respondents)
- 40.6% of respondents disagreed that Saskatchewan is a leader in technology and innovation (46.4% excluding Saskatchewan respondents)

2.3.9.4 Saskatchewan is diversifying its economy



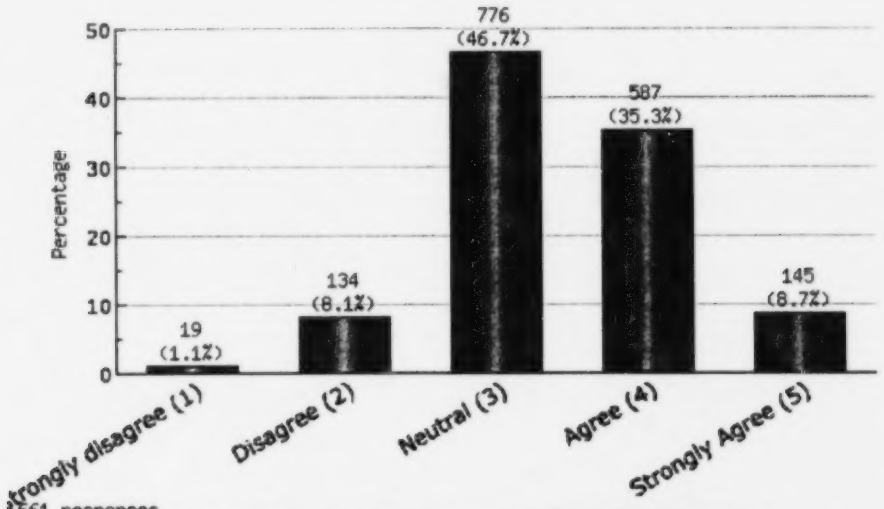
1661 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	38	2.3	2.3	1	38
Disagree (2)	190	11.4	13.7	2	380
Neutral (3)	814	49.0	62.7	3	2442
Agree (4)	528	31.8	94.5	4	2112
Strongly Agree (5)	91	5.5	100.0	5	455
Total	**1661**	**100**			**5427**
Average					**3.3**

Key Findings:

- 37.3% of respondents agreed that Saskatchewan is diversifying its economy (32.3% excluding Saskatchewan respondents)
- 49.0% of respondents were neutral that Saskatchewan is diversifying its economy (55.2% excluding Saskatchewan respondents)
- 13.7% of respondents disagreed that Saskatchewan is diversifying its economy (12.5% excluding Saskatchewan respondents)

2.3.9.5 Saskatchewan has a skilled and educated workforce



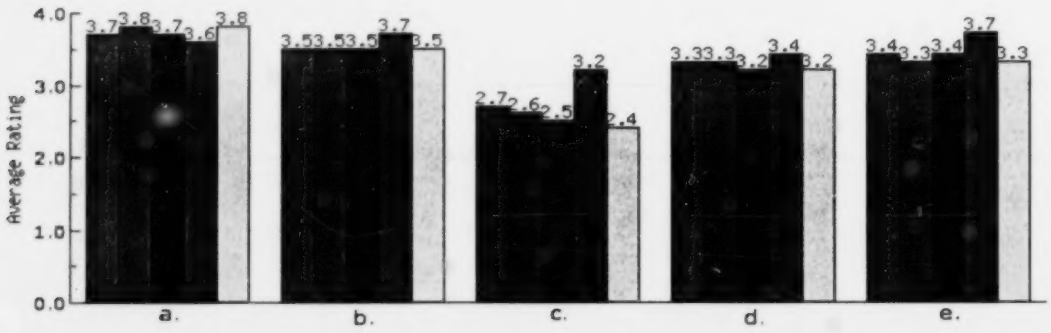
1661 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	19	1.1	1.1	1	19
Disagree (2)	134	8.1	9.2	2	268
Neutral (3)	776	46.7	55.9	3	2328
Agree (4)	587	35.3	91.3	4	2348
Strongly Agree (5)	145	8.7	100.0	5	725
Total	**1661**	**100**			**5688**
Average					**3.4**

Key Findings:

- 44.0% of respondents agreed that Saskatchewan has a skilled and educated workforce (37.1% excluding Saskatchewan respondents)
- 46.7% of respondents were neutral that Saskatchewan has a skilled and educated workforce (54.8% excluding Saskatchewan respondents)
- 9.2% of respondents disagreed that Saskatchewan has a skilled and educated workforce(8.2% excluding Saskatchewan respondents)

2.3.9.6 Level of Agreement with Statements about Saskatchewan by Province

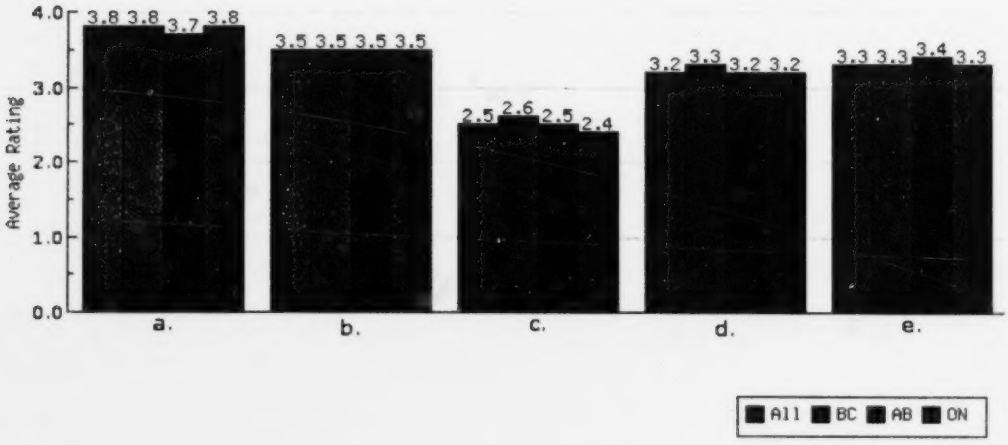


Label	All		BC		AB		SK		ON		Question
	N	Avg	N	Avg	N	Avg	N	Avg	N	Avg	
a.	1660	3.7	406	3.8	419	3.7	432	3.6	403	3.8	Saskatchewan is dependent on a farm-based economy
b.	1660	3.5	406	3.5	419	3.5	432	3.7	403	3.5	Saskatchewan's economy is dependent on natural resources.
c.	1661	2.7	406	2.6	419	2.5	432	3.2	404	2.4	Saskatchewan is a leader in technology and innovation
d.	1661	3.3	406	3.3	419	3.2	432	3.4	404	3.2	Saskatchewan is diversifying its economy
e.	1661	3.4	406	3.3	419	3.4	432	3.7	404	3.3	Saskatchewan has a skilled and educated workforce

Key Findings:

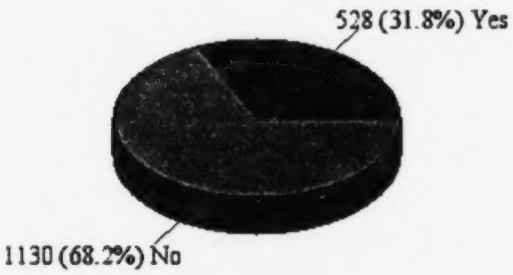
- Respondents had the lowest level of agreement with the statement "Saskatchewan is a leader in technology and innovation" with an average rating of 2.7 out of 5
- Respondents had the highest level of agreement with the statement "Saskatchewan is dependent on a farm based economy" with an average rating of 3.7 out 5
- The view that Saskatchewan is dependent on a farm based economy was highest on average among Ontario and British Columbia respondents with an agreement rating of 3.8 out of 5. This view was the lowest among Saskatchewan respondents with a rating of 3.6 out of 5.
- The view that Saskatchewan's economy is dependent on natural resources was highest on average among Saskatchewan respondents with an agreement rating of 3.7 out of 5. The remaining provinces indicated a rating of 3.5 out of 5.
- The view that Saskatchewan is a leader in technology and innovation was highest on average among Saskatchewan respondents with an agreement rating of 3.2 out of 5. This view was the lowest among Ontario respondents with a rating of 2.4 out of 5.
- The view that Saskatchewan is diversifying its economy was highest on average among Saskatchewan respondents with an agreement rating of 3.4 out of 5. This view was the lowest among Alberta and Ontario respondents with a rating of 3.2 out of 5.
- The view that Saskatchewan has a skilled and educated workforce was highest on average among Saskatchewan respondents with an agreement rating of 3.7 out of 5. This view was the lowest among Ontario and British Columbia respondents with a rating of 3.3 out of 5.

Overall Average without Saskatchewan Respondents



Label	All		BC		AB		ON		Question
	N	Avg	N	Avg	N	Avg	N	Avg	
a.	1228	3.8	406	3.8	419	3.7	403	3.8	Saskatchewan is dependent on a farm-based economy
b.	1228	3.5	406	3.5	419	3.5	403	3.5	Saskatchewan's economy is dependent on natural resources.
c.	1229	2.5	406	2.6	419	2.5	404	2.4	Saskatchewan is a leader in technology and innovation
d.	1229	3.2	406	3.3	419	3.2	404	3.2	Saskatchewan is diversifying its economy
e.	1229	3.3	406	3.3	419	3.4	404	3.3	Saskatchewan has a skilled and educated workforce

2.3.10 Over the past few months, do you recall hearing or seeing any advertising that promotes doing business in Saskatchewan?



1658 responses

Key Findings:

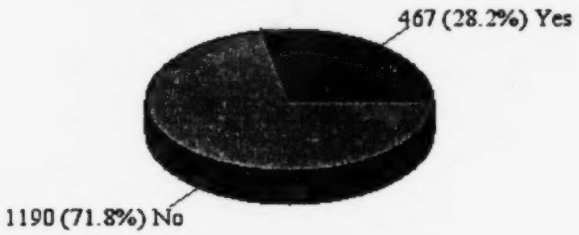
- 31.8% of respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan (18.9% excluding SK respondents)

"Recall of any SK Advertising (no prompt)" **by** *"Province"*

	Totals	Yes	No
Overall Total	**1658 (100%)**	**528 (31.8%)**	**1130 (68.2%)**
Total (w/o SK)	**1227 (100%)**	**232 (18.9%)**	**995 (81.1%)**
British Columbia	**406 (24.5%)**	61 (15.0%)	345 (85.0%)
Alberta	**418 (25.2%)**	126 (30.1%)	292 (69.9%)
Saskatchewan	**431 (26.0%)**	**296 (68.7%)**	135 (31.3%)
Ontario	**403 (24.3%)**	45 (11.2%)	**358 (88.8%)**

- 68.7% of Saskatchewan respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan
- 30.1% of Alberta respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan
- 15% of British Columbia respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan
- 11.2% of Ontario respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan

2.3.11 Specifically, do you recall the "Saskatchewan - Our Future is Wide Open" campaign?



1657 responses

Key Findings:

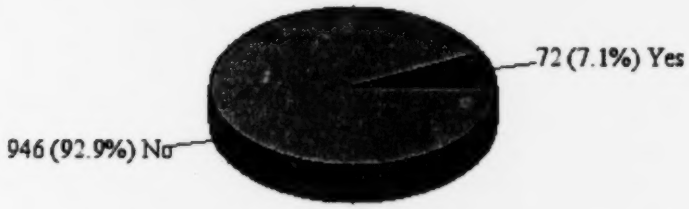
- 28.2% of total respondents recalled the slogan "Saskatchewan - Our Future is Wide Open" (14.3% excluding SK respondents)

"Recall of SK Advertising (Tag Line prompt)" **by** *"Province"*

	Totals	Yes	No
Overall Total	**1657 (100%)**	**467 (28.2%)**	**1190 (71.8%)**
Total (w/o SK)	**1227 (100%)**	**176 (14.3%)**	**1051 (85.7%)**
British Columbia	**406 (24.5%)**	49 (12.1%)	357 (87.9%)
Alberta	**418 (25.2%)**	95 (22.7%)	323 (77.3%)
Saskatchewan	**430 (26.0%)**	**291 (67.7%)**	139 (32.3%)
Ontario	**403 (24.3%)**	32 (7.9%)	**371 (92.1%)**

- 67.7% of Saskatchewan respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"
- 22.7% of Alberta respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"
- 12.1% of British Columbia respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"
- 7.9% of Ontario respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"

2.3.12 Recently, the province of Saskatchewan did unveil a promotional campaign called "Our Future is Wide Open" promoting the province's business sectors such as mining, forestry, advanced technology, and manufacturing. These advertisements have appeared in major Canadian newspapers, on television and in airports providing facts about the business environment and quality of life in Saskatchewan. With this description, do you recall any of these advertisements?



1018 responses

Key Findings:

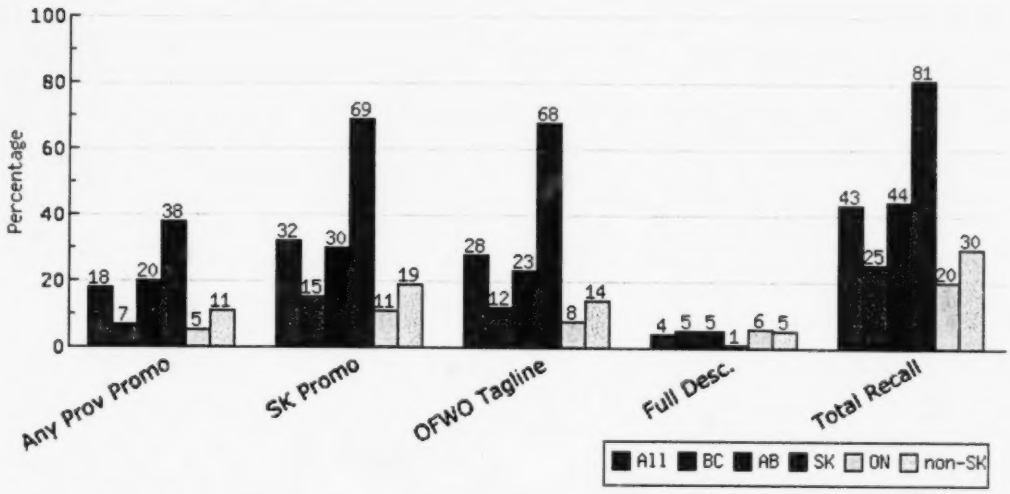
- Of the respondents who did not recall the advertising (unaided) or the slogan, 92.9% still did not recall the advertisements after a brief description

"Recall of SK Advertising (Description of Ad prompt)" **by** *"Province"*

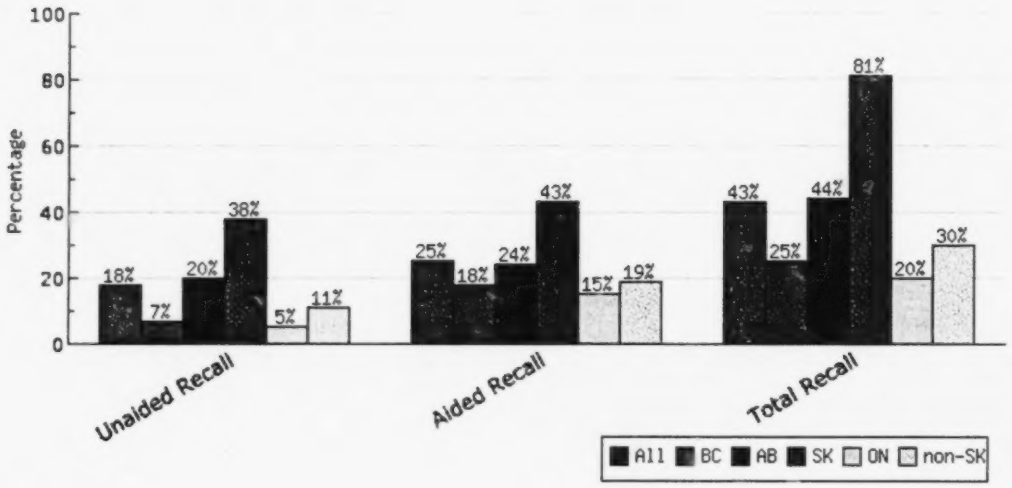
	Totals	Yes	No
Overall Total	**1018 (100%)**	**72 (7.1%)**	**946 (92.9%)**
Total (w/o SK)	**927 (100%)**	**66 (7.1%)**	**861 (92.9%**
British Columbia	**325 (31.9%)**	21 (6.5%)	**304 (93.5%)**
Alberta	**255 (25.0%)**	**20 (7.8%)**	235 (92.2%)
Saskatchewan	**91 (8.9%)**	6 (6.6%)	85 (93.4%)
Ontario	**347 (34.1%)**	25 (7.2%)	322 (92.8%)

- The highest percentage of recall occurred with Alberta respondents in which 7.8% indicated they recalled the advertising after a brief description, followed by Ontario with 7.2% of respondents, and 6.5% of British Columbia respondents

2.3.13 Recall Summary

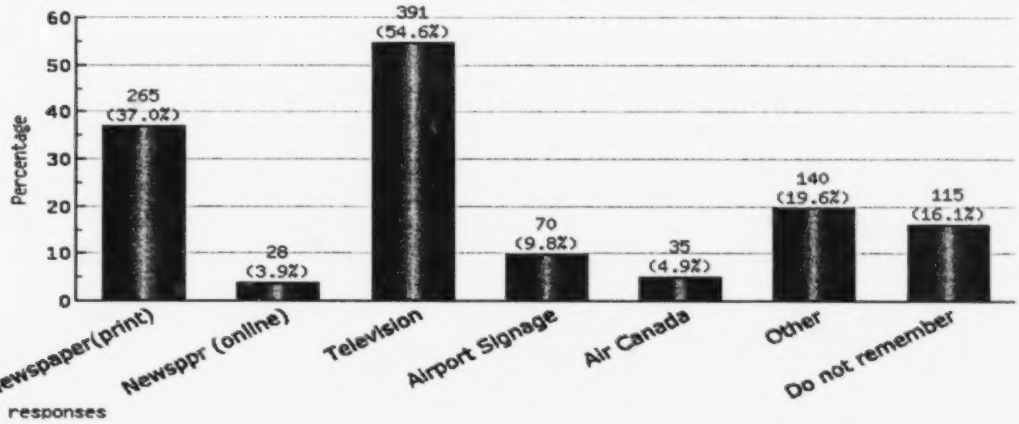


- **Unaided Recall** - 18% recall advertisements promoting Saskatchewan when presented in a list of all the Canadian provinces and territories: "*Have you recently heard or seen any advertising that promotes doing business in any of the following provinces*?. (11% excluding SK respondents)
- **Aided Recall** – 32% recall the advertisements when specifically asked if they recall advertising promoting doing business in Saskatchewan: "*Over the past few months, do you recall hearing or seeing any advertising that promotes doing business in Saskatchewan*?". (19% excluding SK respondents)
- **Tagline Recall** - 28% recall the tagline - Our Future is Wide Open (14% excluding SK respondents)
- **Further Aided** – 4% recall advertisements promoting Saskatchewan with additional description of the advertisement (5% excluding SK respondents)
- **Total Recall** – 43% recall advertisements (aided and unaided) (30% excluding SK respondents)



- **Unaided Recall** - 18% recall advertisements promoting Saskatchewan when presented in a list of all the Canadian provinces and territories: "*Have you recently heard or seen any advertising that promotes doing business in any of the following provinces*?. (11% excluding SK respondents)
- **Aided Recall** is the number of respondents that did not recall the advertisement unaided but did recall the tagline OR the recalled the aided question: "Over the past few months, do you recall hearing or seeing any advertising that promotes doing business in Saskatchewan?" PLUS respondents that recalled the ad after a brief description. Overall, aided recall is 25% and by province, British Columbia is 18%, Alberta is 24%, Saskatchewan is 43%, and Ontario is 15%. (11% excluding SK respondents).
- **Combined Recall** – 43% recall the advertising (30% excluding SK respondents). By province, combined recall is 25% of British Columbia respondents, 44% of Alberta respondents, 81% of Saskatchewan respondents, and 20% of Ontario respondents.

2.3.14 Do you recall hearing or seeing the advertisement(s) in ... (check all that apply)



716 responses

Key Findings:

Of the respondents who recalled the advertising:

- 54.6% indicated they saw the ad on television (46.6% excluding SK respondents)
- 37% indicated newspaper (print) (28.3% excluding SK respondents)
- 19.6% indicated other (12% excluding SK respondents)
- 9.8% indicated airport signage (9% excluding SK respondents)
- 4.9% indicated the in-flight video (6.8% excluding SK respondents)
- 3.9% indicated newspaper (online) (1.9% excluding SK respondents)
- 16.1% of respondents were not sure where they saw the advertising (19.6% excluding SK respondents)

"Media Type Recall" **by** *"Province"*

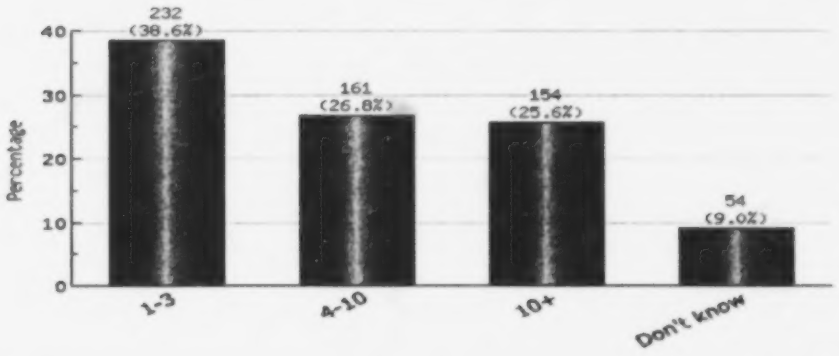
	Totals	Newspaper (print)	Newspaper (online)	Television	Airport Signage	Air Canada	Other	Do not remember
Overall Total	716 (100%)	265 (37.0%)	28 (3.9%)	391 (54.6%)	70 (9.8%)	35 (4.9%)	140 (19.6%)	115 (16.1%)
Total (w/o SK)	367 (100%)	104 (28.3%)	7 (1.9%)	171 (46.6%)	33 (9.0%)	25 (6.8%)	44 (12.0%)	72 (19.6%)
British Columbia	102 (14.2%)	31 (30.4%)	4 (3.9%)	40 (39.2%)	7 (6.9%)	13 (12.7%)	10 (9.8%)	21 (20.6%)
Alberta	183 (25.6%)	51 (27.9%)	1 (0.5%)	90 (49.2%)	20 (10.9%)	9 (4.9%)	29 (15.8%)	36 (19.7%)
Saskatchewan	349 (48.7%)	161 (46.1%)	21 (6.0%)	220 (63.0%)	37 (10.6%)	10 (2.9%)	96 (27.5%)	43 (12.3%)
Ontario	82 (11.5%)	22 (26.8%)	2 (2.4%)	41 (50.0%)	6 (7.3%)	3 (3.7%)	5 (6.1%)	15 (18.3%)

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- Of the 102 respondents in British Columbia who saw or heard the advertisement, 39.2% indicated the television
- Of the 183 respondents in Alberta who saw or heard the advertisement, 49.2% indicated the television
- Of the 82 respondents in Ontario who saw or heard the advertisement, 50% indicated the television

- Saskatchewan had the highest proportion of respondents who recalled the advertising in newspaper (46.1%), newspaper online (6.0%), television (63.0%), and other (27.5%)
- Alberta respondents had the highest proportion of respondents recalling the airport signage (10.9%)
- British Columbia respondents had the highest proportion of respondents recalling the Air Canada in-flight service advertisement (12.7%)

2.3.15 How many times have you seen or heard the advertisements?



601 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
1-3	232	38.6	38.6	1	232
4-10	161	26.8	65.4	2	322
10+	154	25.6	91.0	3	462
Don't know	54	9.0	100.0	98	
Total	**601**	**100**			**1016**
Average					**1.9**

Key Findings:

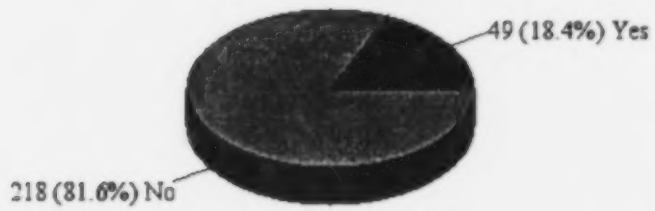
- 38.6% of respondents recalling the Saskatchewan advertising saw the ad 1 to 3 times (62.3% excluding SK respondents)
- 26.8% of respondents recalling the Saskatchewan advertising saw the ad 4 to 10 times (23.2% excluding SK respondents)
- 25.6% of respondents recalling the Saskatchewan advertising saw the ad at least 10 times (3.4% excluding SK respondents)

"Frequency Seen/Heard Advertisements" **by** *"Province"*

	Totals	1-3	4-10	10+	Don't know
Overall Total	**601 (100%)**	**232 (38.6%)**	**161 (26.8%)**	**154 (25.6%)**	**54 (9.0%)**
Total (w/o SK)	**297 (100%)**	**185 (62.3%)**	**69 (23.2%)**	**10 (3.4%)**	**33 (11.1%)**
British Columbia	**81 (13.5%)**	**57 (70.4%)**	11 (13.6%)	1 (1.2%)	**12 (14.8%)**
Alberta	**149 (24.8%)**	82 (55.0%)	43 (28.9%)	6 (4.0%)	18 (12.1%)
Saskatchewan	**304 (50.6%)**	47 (15.5%)	**92 (30.3%)**	**144 (47.4%)**	21 (6.9%)
Ontario	**67 (11.1%)**	46 (68.7%)	15 (22.4%)	3 (4.5%)	3 (4.5%)

- Respondents from British Columbia recalled seeing the advertisement the least with 70.4% indicating between 1 to 3 times
- Saskatchewan respondents recalled seeing the advertisement the most with 47.4% indicating at least 10 times
- 32.9% of Alberta respondents saw the ad at least 4 times
- 26.9% of Ontario respondents saw the ad at least 4 times
- 77.7% of Saskatchewan respondents saw the ad at least 4 times

2.3.16 Do you recall seeing a special supplement on Saskatchewan in the Globe and Mail in May?



267 responses

Key Findings:

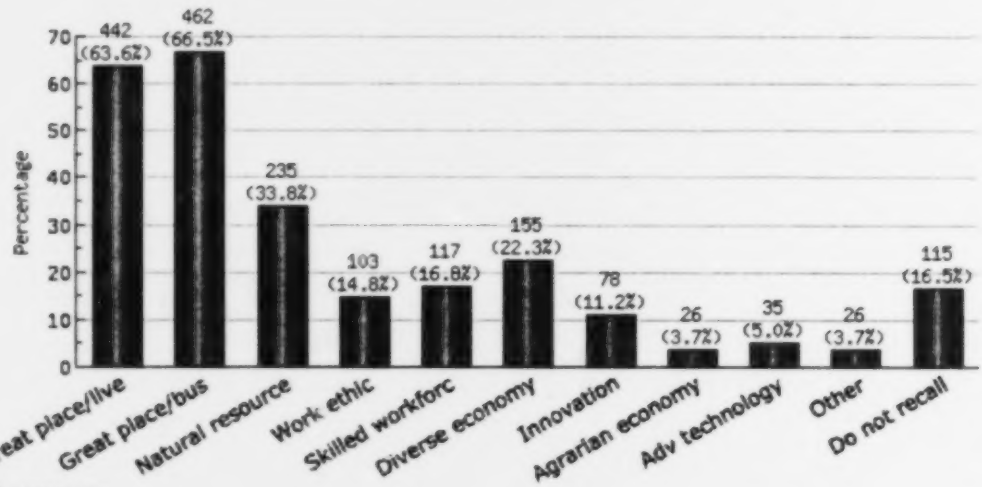
- 18.4% of respondents indicated seeing the special supplement on Saskatchewan in the Globe and Mail in May (26.5% excluding SK respondents)

"Saw Globe and Mail Supplement" **by** *"Province"*

	Totals	Yes	No
Overall Total	**267 (100%)**	**49 (18.4%)**	**218 (81.6%)**
Totals (w/o SK)	**102 (100%)**	**27 (26.5%)**	**75 (73.5%)**
British Columbia	**29 (10.9%)**	6 (20.7%)	23 (79.3%)
Alberta	**51 (19.1%)**	11 (21.6%)	40 (78.4%)
Saskatchewan	**165 (61.8%)**	22 (13.3%)	**143 (86.7%)**
Ontario	**22 (8.2%)**	**10 (45.5%)**	12 (54.5%)

- Ontario respondents were the most likely to recall the supplement (45.5%), followed by Alberta (21.6%), and British Columbia (20.7%)

2.3.17 Please choose the top *three* messages you believe the ads were trying to convey.



695 responses

Key Findings:

- Of the respondents who recalled the advertising, the top three messages respondents believed that the advertising was trying to convey include:
  - Saskatchewan is a great place to do business (66.5%)
    (64.6% excluding SK respondents)
  - Saskatchewan is a great place to live (63.6%)
    (53.3% excluding SK respondents)
  - Saskatchewan is rich in natural resources (33.8%)
    (31.2% excluding SK respondents)

"Top three messages" **by** *"Province"*

	Totals	Great place/live	Great place/bus	Natural resource	Work ethic	Skilled workforce	Diverse economy	Innovation	Agrarian economy	Adv technology	Other	Do not recall
Overall Total	**695 (100%)**	**442 (63.6%)**	**462 (66.5%)**	**235 (33.8%)**	**103 (14.8%)**	**117 (16.8%)**	**155 (22.3%)**	**78 (11.2%)**	**26 (3.7%)**	**35 (5.0%)**	**26 (3.7%)**	**115 (16.5%)**
Total (w/o SK)	**362 (100%)**	**193 (53.3%)**	**234 (64.6%)**	**113 (31.2%)**	**56 (15.5%)**	**63 (17.4%)**	**77 (21.3%)**	**45 (12.4%)**	**18 (5.0%)**	**17 (4.7%)**	**13 (3.6%)**	**0 (0.0%)**
British Columbia	**100 (14.4%)**	45 (45.0%)	64 (64.0%)	26 (26.0%)	**16 (16.0%)**	17 (17.0%)	19 (19.0%)	**13 (13.0%)**	4 (4.0%)	**10 (10.0%)**	2 (2.0%)	22 (22.0%)
Alberta	**180 (25.9%)**	106 (58.9%)	117 (65.0%)	64 (35.6%)	27 (15.0%)	31 (17.2%)	41 (22.8%)	23 (12.8%)	8 (4.4%)	3 (1.7%)	**10 (5.6%)**	30 (16.7%)
Saskatchewan	**333 (47.9%)**	**249 (74.8%)**	**228 (68.5%)**	**122 (36.6%)**	47 (14.1%)	54 (16.2%)	**78 (23.4%)**	33 (9.9%)	8 (2.4%)	18 (5.4%)	13 (3.9%)	44 (13.2%)
Ontario	**82 (11.8%)**	42 (51.2%)	53 (64.6%)	23 (28.0%)	13 (15.9%)	**15 (18.3%)**	17 (20.7%)	9 (11.0%)	**6 (7.3%)**	4 (4.9%)	1 (1.2%)	**19 (23.2%)**

Note: *"Refused / don't know" responses are included in the "Totals" column.*

- Of the four provinces surveyed, a higher proportion of respondents in British Columbia indicated work ethic (16.0%), innovation (13.0%), and advanced technology (10.0%)
- Of the four provinces surveyed, a higher proportion of respondents in Saskatchewan indicated a great place to live(74.8%), a great place to do business (68.5%), and rich in natural resources (36.6)
- Of the four provinces surveyed, a higher proportion of respondents in Ontario indicated skilled workforce (18.3%), and agrarian economy (7.3%)

2.3.18 Did you learn something new about Saskatchewan from the advertising?

693 responses

Key Findings:

- Of the respondents who recalled the advertising, 22.4% indicated learning something new about Saskatchewan (25.6% excluding SK respondents)

"Learned Something New about SK" **by** *"Province"*

	Totals	Yes	No
Overall Total	693 (100%)	155 (22.4%)	538 (77.6%)
Total (w/o SK)	363 (100%)	93 (25.6%)	270 (74.4%)
British Columbia	100 (14.4%)	31 (31.0%)	69 (69.0%)
Alberta	181 (26.1%)	42 (23.2%)	139 (76.8%)
Saskatchewan	330 (47.6%)	62 (18.8%)	268 (81.2%)
Ontario	82 (11.8%)	20 (24.4%)	62 (75.6%)

- By province, 31.0% of British Columbia respondents indicated learning something new about Saskatchewan, followed by Ontario (24.4%), and Alberta (23.2%)

"Learned Something New about SK" **by** *"Sector"*

	Totals	Yes	No
Overall Total	693 (100%)	155 (22.4%)	538 (77.6%)
General Manufacturing	160 (23.1%)	29 (18.1%)	131 (81.9%)
Agri-value	20 (2.9%)	6 (30.0%)	14 (70.0%)
Advanced Technology	145 (20.9%)	40 (27.6%)	105 (72.4%)
Forestry	38 (5.5%)	10 (26.3%)	28 (73.7%)
Mining	23 (3.3%)	3 (13.0%)	20 (87.0%)
Oil and Gas	142 (20.5%)	30 (21.1%)	112 (78.9%)
Financial	91 (13.1%)	20 (22.0%)	71 (78.0%)
Other	74 (10.7%)	17 (23.0%)	57 (77.0%)

- 30% of the agri-value companies surveyed (6 respondents) indicated learning something new, followed by advanced technology (27.6%), and forestry (26.3%)

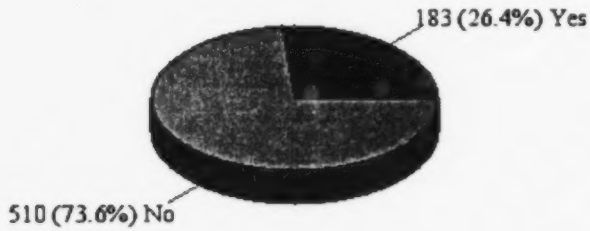
Excluding Saskatchewan Respondents

"Learned Something New about SK" **by** *"Sector"*

	Totals	Yes	No
Totals	**363 (100%)**	**93 (25.6%)**	**270 (74.4%)**
General Manufacturing	**68 (18.7%)**	16 (23.5%)	52 (76.5%)
Agrivalue	**6 (1.7%)**	**3 (50.0%)**	3 (50.0%)
Advanced Technology	**78 (21.5%)**	25 (32.1%)	53 (67.9%)
Forestry	**34 (9.4%)**	10 (29.4%)	24 (70.6%)
Mining	**17 (4.7%)**	1 (5.9%)	**16 (94.1%)**
Oil and Gas	**95 (26.2%)**	22 (23.2%)	73 (76.8%)
Financial	**46 (12.7%)**	9 (19.6%)	37 (80.4%)
Other	**19 (5.2%)**	7 (36.8%)	12 (63.2%)

- 50% of the agri-value companies surveyed (3 respondents) indicated learning something new, followed by other (36.8%), advanced technology (32.1%), and forestry (29.4%)

2.3.19 Has the advertising piqued your interest in learning more about Saskatchewan?



693 responses

Key Findings:

Of the respondents who recalled the advertising:

- 26.4% of respondents indicated that the advertising piqued their interest to learn more about Saskatchewan (27.8% excluding SK respondents)

"Interest in Learning More about SK" **by** *"Province"*

	Totals	Yes	No
Overall Total	**693 (100%)**	**183 (26.4%)**	**510 (73.6%)**
Total (w/o SK)	**363 (100%)**	**101 (27.8%)**	**262 (72.2%)**
British Columbia	**100 (14.4%)**	22 (22.0%)	**78 (78.0%)**
Alberta	**181 (26.1%)**	54 (29.8%)	127 (70.2%)
Saskatchewan	**330 (47.6%)**	82 (24.8%)	248 (75.2%)
Ontario	**82 (11.8%)**	**25 (30.5%)**	57 (69.5%)

- By province, respondents from Ontario are the most interested (30.5%) in learning more about Saskatchewan, followed by Alberta respondents (29.8%)

"Interest in Learning More about SK" **by** *"Sector"*

	Totals	Yes	No
Overall Total	**693 (100%)**	**183 (26.4%)**	**510 (73.6%)**
General Manufacturing	**160 (23.1%)**	28 (17.5%)	**132 (82.5%)**
Agri-value	**20 (2.9%)**	**7 (35.0%)**	13 (65.0%)
Advanced Technology	**145 (20.9%)**	45 (31.0%)	100 (69.0%)
Forestry	**38 (5.5%)**	10 (26.3%)	28 (73.7%)
Mining	**23 (3.3%)**	5 (21.7%)	18 (78.3%)
Oil and Gas	**142 (20.5%)**	45 (31.7%)	97 (68.3%)
Financial	**91 (13.1%)**	26 (28.6%)	65 (71.4%)
Other	**74 (10.7%)**	17 (23.0%)	57 (77.0%)

- Those respondents in the agri-value sector (35%) indicated the most interest in learning more about Saskatchewan, followed by the oil and gas sector (31.7%) and the advanced technology sector (31.0%)

Excluding Saskatchewan Respondents:
"Interest in Learning More about SK" **by** *"Sector"*

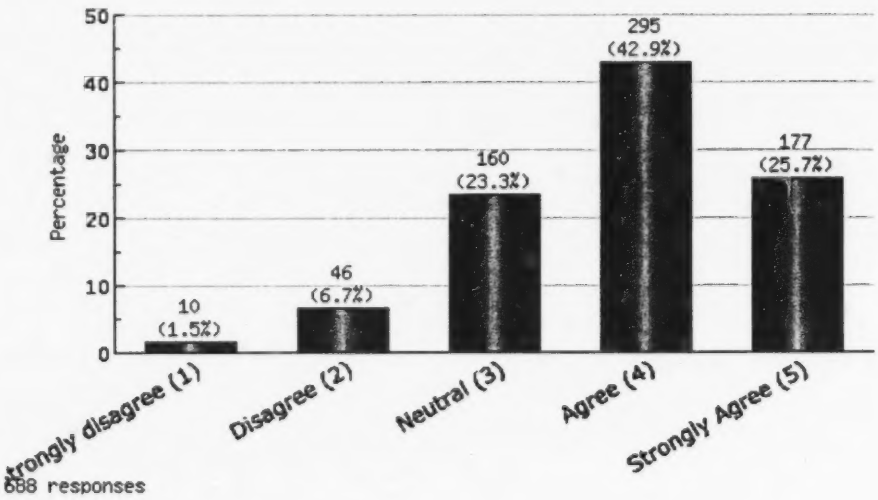
	Totals	Yes	No
Totals	**363 (100%)**	**101 (27.8%)**	**262 (72.2%)**
General Manufacturing	**68 (18.7%)**	13 (19.1%)	55 (80.9%)
Agrivalue	**6 (1.7%)**	**3 (50.0%)**	3 (50.0%)
Advanced Technology	**78 (21.5%)**	22 (28.2%)	56 (71.8%)
Forestry	**34 (9.4%)**	10 (29.4%)	24 (70.6%)
Mining	**17 (4.7%)**	4 (23.5%)	13 (76.5%)
Oil and Gas	**95 (26.2%)**	33 (34.7%)	62 (65.3%)
Financial	**46 (12.7%)**	13 (28.3%)	33 (71.7%)
Other	**19 (5.2%)**	3 (15.8%)	**16 (84.2%)**

- Those respondents in the agri-value sector (50%) indicated the most interest in learning more about Saskatchewan, followed by the oil and gas sector (34.7%) and the forestry sector (29.4%)

2.3.20 Here are some of the ads you may have seen. Please review (click on ad to view larger image) and indicate the extent to which you agree or disagree with each of the statements at the bottom of the screen using a 5-point scale where "1" is strongly disagree and "5" is strongly agree.

Over half the province is forest
To really know our strengths, look beneath the surface
More is more
Patents will be pending
Outsmart your competitors
Start with the best ingredients

2.3.20.1 Saskatchewan is a good place to live

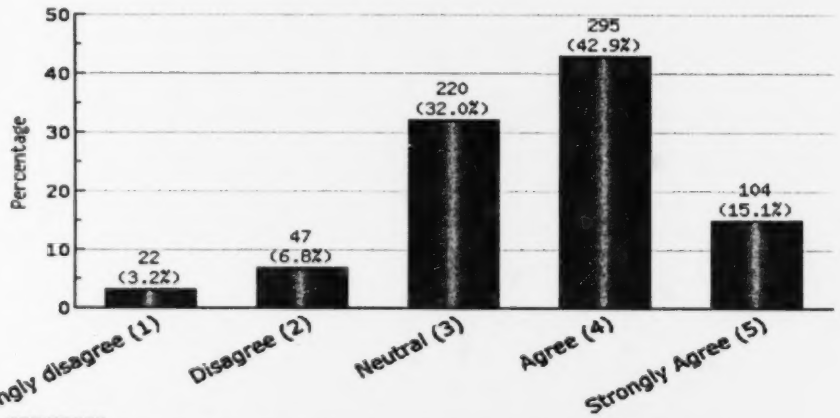


	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	10	1.5	1.5	1	10
Disagree (2)	46	6.7	8.1	2	92
Neutral (3)	160	23.3	31.4	3	480
Agree (4)	295	42.9	74.3	4	1180
Strongly Agree (5)	177	25.7	100.0	5	885
Total	**688**	**100**			**2647**
Average					**3.8**

Key Findings:

- 68.6% of respondents agree or strongly agree with the statement Saskatchewan is a good place to live (52.3% excluding Saskatchewan respondents)
- 23.3% of respondents are undecided in regards to the statement Saskatchewan is a good place to live (33.9% excluding Saskatchewan respondents)
- 8.2% of respondents disagree or strongly disagree with the statement Saskatchewan is a good place to live (13.7% excluding Saskatchewan respondents)

2.3.20.2 Saskatchewan is a good place to do business

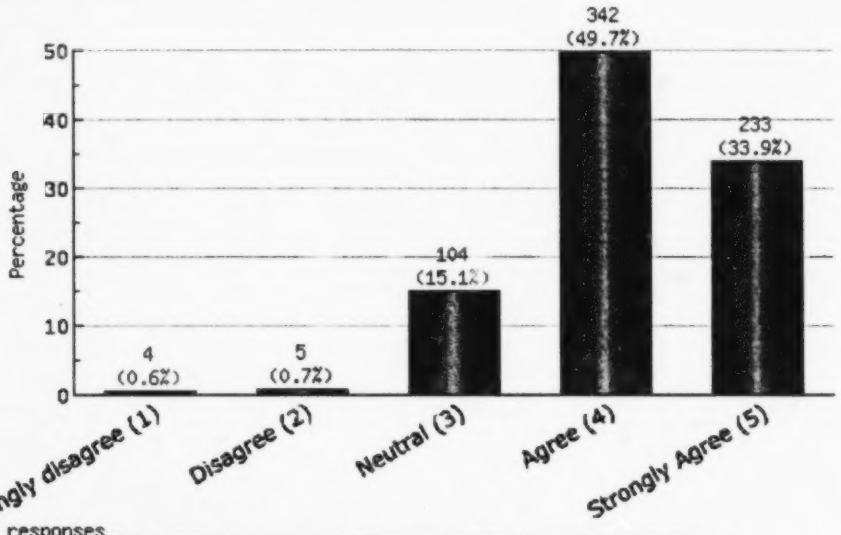


	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	22	3.2	3.2	1	22
Disagree (2)	47	6.8	10.0	2	94
Neutral (3)	220	32.0	42.0	3	660
Agree (4)	295	42.9	84.9	4	1180
Strongly Agree (5)	104	15.1	100.0	5	520
Total	**688**	**100**			**2476**
Average					**3.6**

Key Findings:

- 58.0% of respondents agree or strongly agree with the statement Saskatchewan is a good place to do business (54.6% excluding Saskatchewan respondents)
- 32.0% of respondents are undecided in regards to the statement Saskatchewan is a good place to do business (38.1% excluding Saskatchewan respondents)
- 10.0% of respondents disagree or strongly disagree with the statement Saskatchewan is a good place to do business (7.3% excluding Saskatchewan respondents)

2.3.20.3 Saskatchewan is rich in natural resources



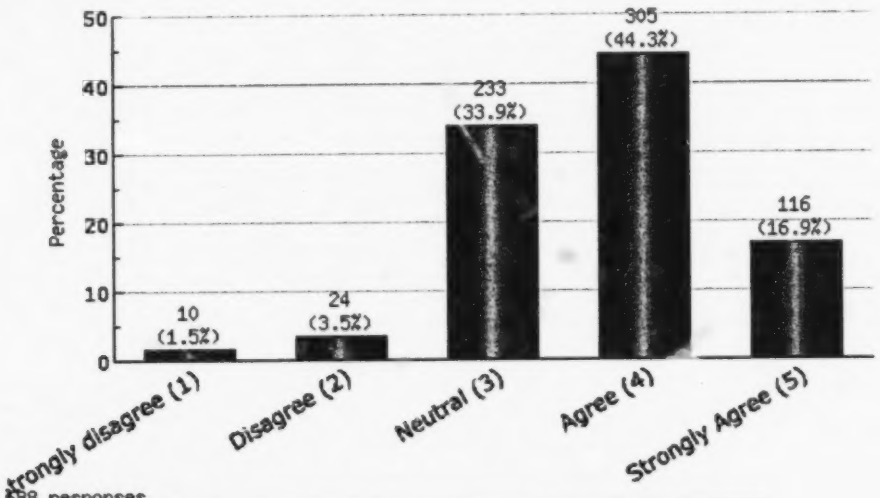
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	4	0.6	0.6	1	4
Disagree (2)	5	0.7	1.3	2	10
Neutral (3)	104	15.1	16.4	3	312
Agree (4)	342	49.7	66.1	4	1368
Strongly Agree (5)	233	33.9	100.0	5	1165
Total	**688**	**100**			**2859**
Average					**4.2**

Key Findings:

- 83.6% of respondents agree or strongly agree with the statement Saskatchewan is rich in natural resources (76.8% excluding Saskatchewan respondents)
- 15.1% of respondents are undecided in regards to the statement Saskatchewan is rich in natural resources (22.1% excluding Saskatchewan respondents)
- 1.3% of respondents disagree or strongly disagree with the statement Saskatchewan is rich in natural resources (1.1% excluding Saskatchewan respondents)

2.3.20.4 Saskatchewan workers have a great attitude and strong work ethic



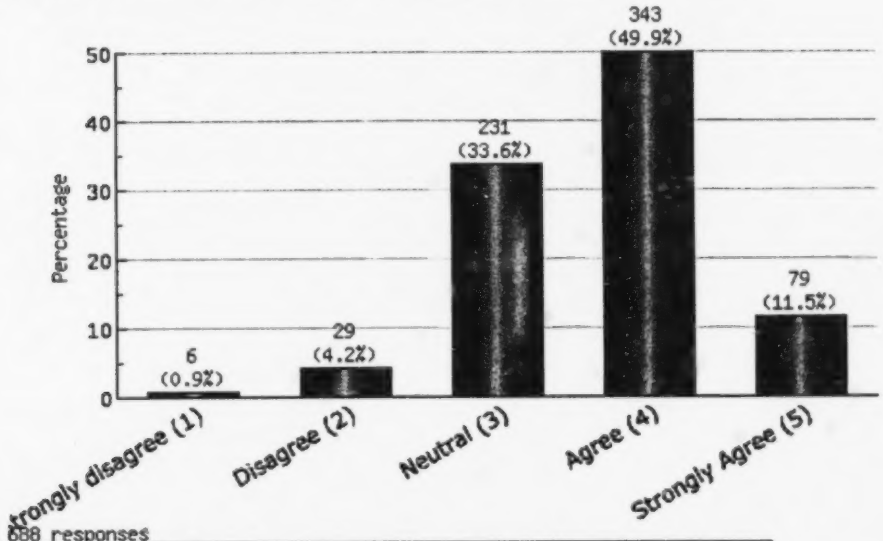
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	10	1.5	1.5	1	10
Disagree (2)	24	3.5	4.9	2	48
Neutral (3)	233	33.9	38.8	3	699
Agree (4)	305	44.3	83.1	4	1220
Strongly Agree (5)	116	16.9	100.0	5	580
Total	**688**	**100**			**2557**
Average					**3.7**

Key Findings:

- 61.2% of respondents agree or strongly agree with the statement Saskatchewan workers have a great attitude and strong work ethic (53.5% excluding Saskatchewan respondents)
- 33.9% of respondents are undecided in regards to the statement Saskatchewan workers have a great attitude and strong work ethic (42.6% excluding Saskatchewan respondents)
- 5.0% of respondents disagree or strongly disagree with the statement Saskatchewan workers have a great attitude and strong work ethic (3.9% excluding Saskatchewan respondents)

2.3.20.5 Saskatchewan has an educated and skilled workforce



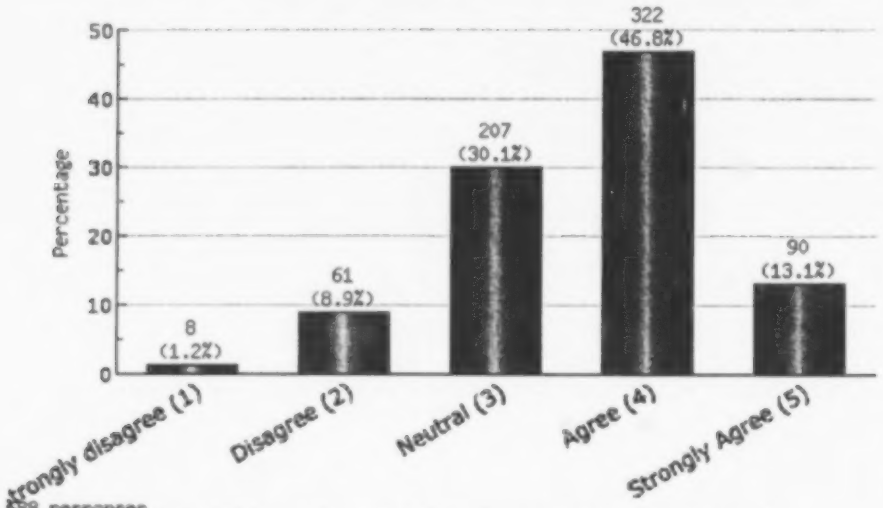
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	6	0.9	0.9	1	6
Disagree (2)	29	4.2	5.1	2	58
Neutral (3)	231	33.6	38.7	3	693
Agree (4)	343	49.9	88.5	4	1372
Strongly Agree (5)	79	11.5	100.0	5	395
Total	**688**	**100**			**2524**
Average					**3.7**

Key Findings:

- 61.4% of respondents agree or strongly agree with the statement Saskatchewan has an educated and skilled workforce (54.9% excluding Saskatchewan respondents)
- 33.6% of respondents are undecided in regards to the statement Saskatchewan has an educated and skilled workforce (40.3% excluding Saskatchewan respondents)
- 5.1% of respondents disagree or strongly disagree with the statement Saskatchewan has an educated and skilled workforce (4.8% excluding Saskatchewan respondents)

2.3.20.6 Saskatchewan has a diverse economy



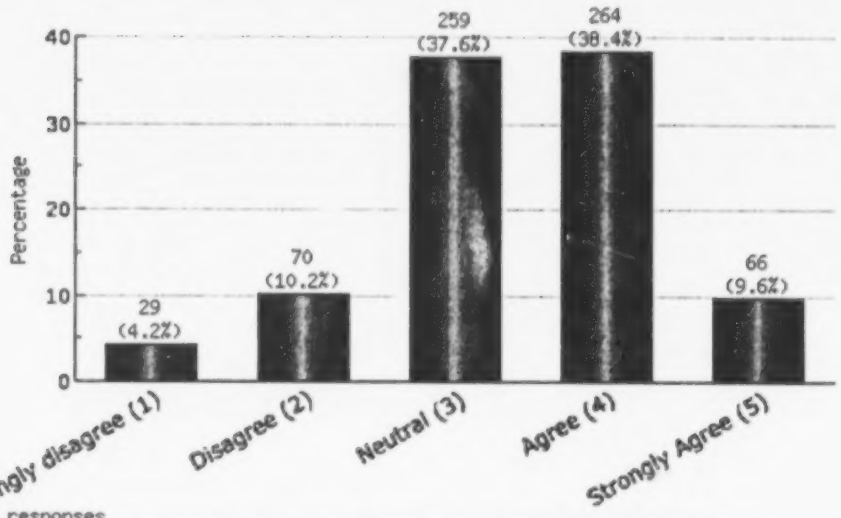
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	8	1.2	1.2	1	8
Disagree (2)	61	8.9	10.0	2	122
Neutral (3)	207	30.1	40.1	3	621
Agree (4)	322	46.8	86.9	4	1288
Strongly Agree (5)	90	13.1	100.0	5	450
Total	**688**	**100**			**2489**
Average					**3.6**

Key Findings:

- 59.9% of respondents agree or strongly agree with the statement Saskatchewan has a diverse economy (53% excluding Saskatchewan respondents)
- 30.1% of respondents are undecided in regards to the statement Saskatchewan has a diverse economy (35.6% excluding Saskatchewan respondents)
- 10.1% of respondents disagree or strongly disagree with the statement Saskatchewan has a diverse economy (11.5% excluding Saskatchewan respondents)

2.3.20.7 Saskatchewan is an innovative and vibrant business environment



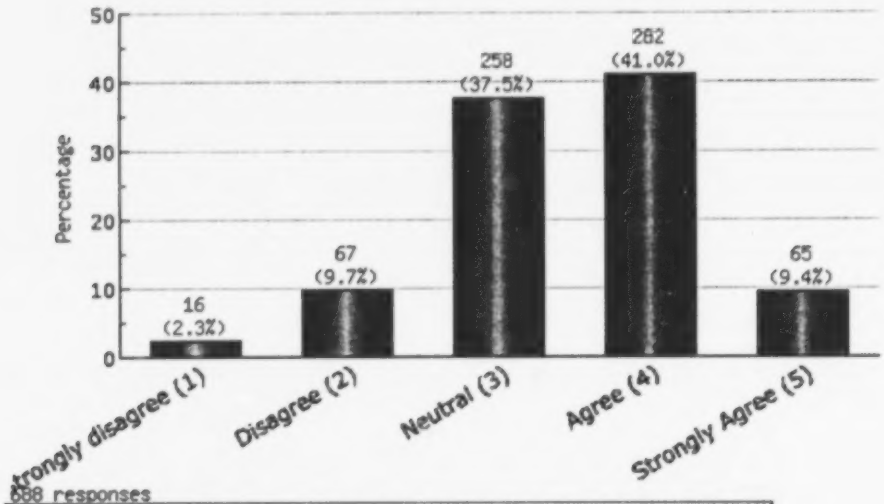
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	29	4.2	4.2	1	29
Disagree (2)	70	10.2	14.4	2	140
Neutral (3)	259	37.6	52.0	3	777
Agree (4)	264	38.4	90.4	4	1056
Strongly Agree (5)	66	9.6	100.0	5	330
Total	**688**	**100**			**2332**
Average					**3.4**

Key Findings:

- 48.0% of respondents agree or strongly agree with the statement Saskatchewan is an innovative and vibrant business environment (43.4% excluding Saskatchewan respondents)
- 37.6% of respondents are undecided in regards to the statement Saskatchewan is an innovative and vibrant business environment (43.7% excluding Saskatchewan respondents)
- 14.4% of respondents disagree or strongly disagree with the statement Saskatchewan is an innovative and vibrant business environment (12.9% excluding Saskatchewan respondents)

2.3.20.8 Saskatchewan is a province with advanced technologies



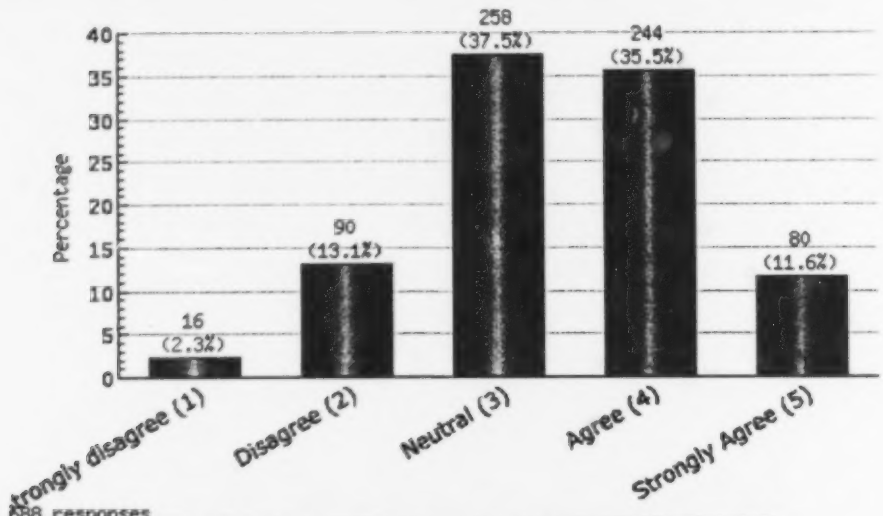
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	16	2.3	2.3	1	16
Disagree (2)	67	9.7	12.1	2	134
Neutral (3)	258	37.5	49.6	3	774
Agree (4)	282	41.0	90.6	4	1128
Strongly Agree (5)	65	9.4	100.0	5	325
Total	**688**	**100**			**2377**
Average					**3.5**

Key Findings:

- 50.4% of respondents agree or strongly agree with the statement Saskatchewan is a province with advanced technologies (39.2% excluding Saskatchewan respondents)
- 37.5% of respondents are undecided with the statement Saskatchewan is a province with advanced technologies (44.8% excluding Saskatchewan respondents)
- 12.0% of respondents disagree or strongly disagree with the statement Saskatchewan is a province with advanced technologies (15.9% excluding Saskatchewan respondents)

2.3.20.9 Saskatchewan is predominantly an agrarian economy



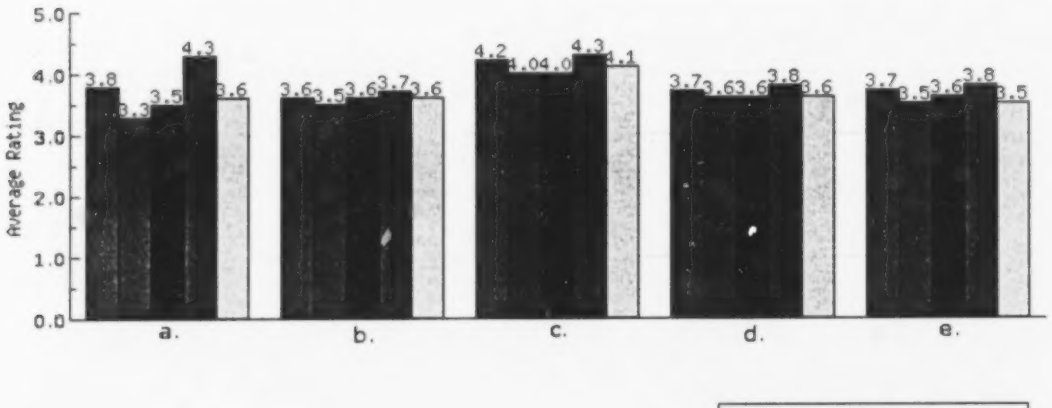
688 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
Strongly disagree (1)	16	2.3	2.3	1	16
Disagree (2)	90	13.1	15.4	2	180
Neutral (3)	258	37.5	52.9	3	774
Agree (4)	244	35.5	88.4	4	976
Strongly Agree (5)	80	11.6	100.0	5	400
Total	**688**	**100**			**2346**
Average					**3.4**

Key Findings:

- 47.1% of respondents agree or strongly agree with the statement Saskatchewan is predominantly an agrarian economy (49.9% excluding Saskatchewan respondents)
- 37.5% of respondents are undecided in regards to the statement Saskatchewan is predominantly an agrarian economy (35.6% excluding Saskatchewan respondents)
- 15.4% of respondents disagree or strongly disagree with the statement Saskatchewan is predominantly an agrarian economy (14.6% excluding Saskatchewan respondents)

2.3.20.10 Level of Agreement with Statements about Saskatchewan by Province

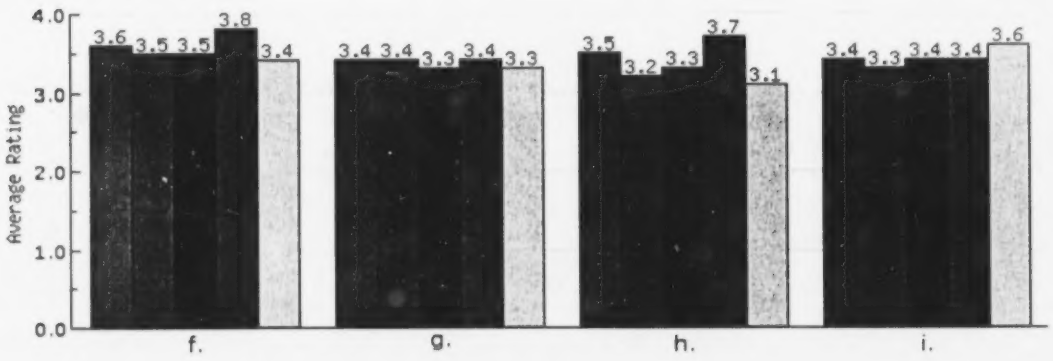


Label	All		BC		AB		SK		ON		Question
	N	Avg	N	Avg	N	Avg	N	Avg	N	Avg	
a.	688	3.8	99	3.3	179	3.5	331	4.3	79	3.6	Saskatchewan is a good place to live
b.	688	3.6	99	3.5	179	3.6	331	3.7	79	3.6	Saskatchewan is a good place to do business
c.	688	4.2	99	4.0	179	4.0	331	4.3	79	4.1	Saskatchewan is rich in natural resources
d.	688	3.7	99	3.6	179	3.6	331	3.8	79	3.6	Saskatchewan workers have a great attitude and strong work ethic
e.	688	3.7	99	3.5	179	3.6	331	3.8	79	3.5	Saskatchewan has an educated and skilled workforce

Key Findings:

- Saskatchewan respondents agreed the most (4.3) with the statement *Saskatchewan is a good place to live*, followed by Ontario (3.6), Alberta (3.5) and British Columbia (3.3)
- Saskatchewan respondents agree the most (3.7) with the statement *Saskatchewan is a good place to do business*, followed by Ontario (3.6) and Alberta (3.6) and British Columbia (3.5)
- Saskatchewan respondents agree the most (4.3) with the statement *Saskatchewan is rich in natural resources*, followed by Ontario (4.1), Alberta (4.0) and British Columbia (4.0)
- Saskatchewan respondents agree the most (3.8) with the statement *Saskatchewan workers have a great attitude and strong work ethic*, followed by Ontario (3.6), Alberta (3.6) and British Columbia (3.6)
- Saskatchewan respondents agree the most (3.8) with the statement *Saskatchewan has an educated and skilled workforce*, followed by Alberta (3.6), Ontario (3.5) and British Columbia (3.5)

Level of Agreement with Statements about Saskatchewan

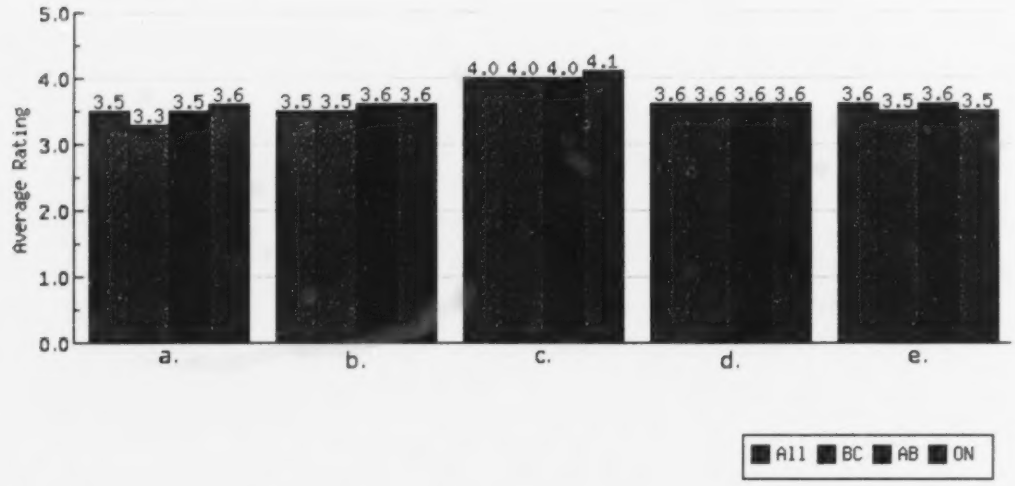


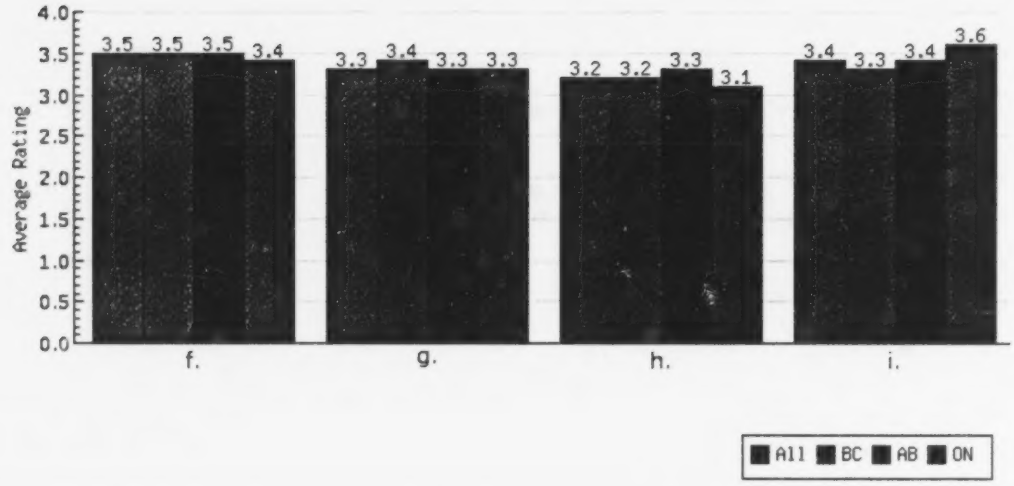
Label	All		BC		AB		SK		ON		Question
	N	Avg	N	Avg	N	Avg	N	Avg	N	Avg	
f.	688	3.6	99	3.5	179	3.5	331	3.8	79	3.4	Saskatchewan has a diverse economy
g.	688	3.4	99	3.4	179	3.3	331	3.4	79	3.3	Saskatchewan is an innovative and vibrant business environment
h.	688	3.5	99	3.2	179	3.3	331	3.7	79	3.1	Saskatchewan is province with advanced technologies
i.	688	3.4	99	3.3	179	3.4	331	3.4	79	3.6	Saskatchewan is predominantly an agrarian economy

Key Findings:

- Saskatchewan respondents agree the most (3.8) with the statement *Saskatchewan has a diverse economy*, followed by Alberta (3.5), British Columbia (3.5), and Ontario (3.4)
- Agreement with the statement *Saskatchewan is an innovative and vibrant business environment* was the same for respondents in Saskatchewan (3.4) and British Columbia (3.4), followed by Alberta (3.3), and Ontario (3.3)
- Saskatchewan respondents agree the most (3.7) with the statement *Saskatchewan is a province with advanced technologies*, followed by Alberta (3.3), British Columbia (3.2), and Ontario (3.1)
- Agreement with the statement *Saskatchewan is predominantly an agrarian economy* was greatest in Ontario (3.6), followed by Alberta (3.4), Saskatchewan (3.4) and British Columbia (3.3)

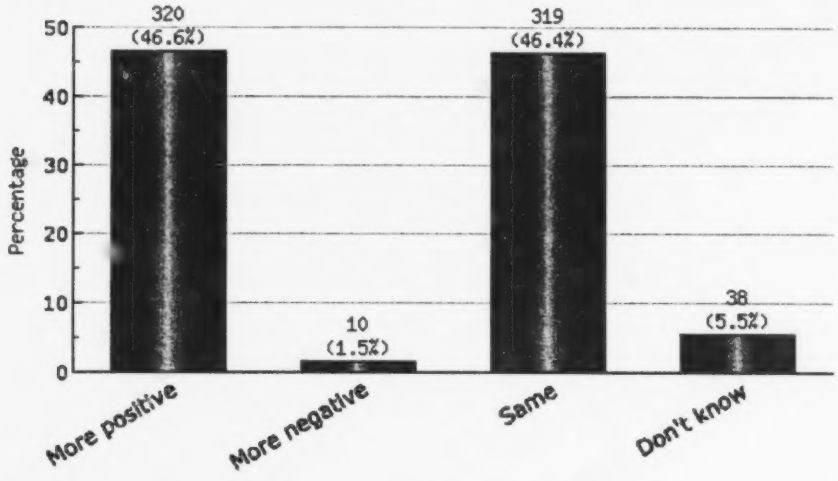
Overall Averages without Saskatchewan Respondents





Label	All		BC		AB		ON		Question
	N	Avg	N	Avg	N	Avg	N	Avg	
a.	357	3.5	99	3.3	179	3.5	79	3.6	Saskatchewan is a good place to live
b.	357	3.5	99	3.5	179	3.6	79	3.6	Saskatchewan is a good place to do business
c.	357	4.0	99	4.0	179	4.0	79	4.1	Saskatchewan is rich in natural resources
d.	357	3.6	99	3.6	179	3.6	79	3.6	Saskatchewan workers have a great attitude and strong work ethic
e.	357	3.6	99	3.5	179	3.6	79	3.5	Saskatchewan has an educated and skilled workforce
f.	357	3.5	99	3.5	179	3.5	79	3.4	Saskatchewan has a diverse economy
g.	357	3.3	99	3.4	179	3.3	79	3.3	Saskatchewan is an innovative and vibrant business environment
h.	357	3.2	99	3.2	179	3.3	79	3.1	Saskatchewan is province with advanced technologies
i.	357	3.4	99	3.3	179	3.4	79	3.6	Saskatchewan is predominantly an agraian economy

2.3.21 As a result of seeing the "Saskatchewan. Our Future is Wide Open" advertising, would you say your attitude towards Saskatchewan has ...



687 responses

	Total #	% of Responses	Cumulative %	Weight	Weighted Total
More positive	320	46.6	46.6	1	320
More negative	10	1.5	48.0	2	20
Same	319	46.4	94.5	3	957
Don't know	38	5.5	100.0	98	
Total	**687**	**100**			**1297**
Average					**2.0**

Key Findings:

Of the respondents who recalled the advertising:

- 46.6% of respondents indicated a more positive attitude towards Saskatchewan as a result of viewing the advertising (53.5% excluding SK respondents)
- 46.4% of respondents indicated their attitude remained the same after viewing the advertising (39.2% excluding SK respondents)
- 1.5% indicated their attitude became more negative as a result of viewing the advertising (0.8% excluding SK respondents)

"Attitude Towards SK Since Ads" **by** *"Province"*

	Totals	More positive	More negative	Same	Don't know
Overall Total	**687 (100%)**	**320 (46.6%)**	**10 (1.5%)**	**319 (46.4%)**	**38 (5.5%)**
Totals (w/o SK)	**357 (100%)**	**191 (53.5%)**	**3 (0.8%)**	**140 (39.2%)**	**23 (6.4%)**
British Columbia	**99 (14.4%)**	53 (53.5%)	1 (1.0%)	41 (41.4%)	4 (4.0%)
Alberta	**179 (26.1%)**	89 (49.7%)	1 (0.6%)	78 (43.6%)	11 (6.1%)
Saskatchewan	**330 (48.0%)**	129 (39.1%)	**7 (2.1%)**	**179 (54.2%)**	15 (4.5%)
Ontario	**79 (11.5%)**	**49 (62.0%)**	1 (1.3%)	21 (26.6%)	**8 (10.1%)**

- 62.0% of Ontario respondents indicated their attitude towards Saskatchewan became more positive as a result of viewing the advertising
- 53.5% of British Columbia respondents indicated their attitude became more positive towards Saskatchewan as a result of viewing the advertising, followed by 49.7% of Alberta respondents, and 39.1% of Saskatchewan respondents

"Attitude Towards SK Since Ads" **by** *"Sector"*

	Totals	More positive	More negative	Same	Don't know
Overall Total	**687 (100%)**	**320 (46.6%)**	**10 (1.5%)**	**319 (46.4%)**	**38 (5.5%)**
General Manufacturing	**159 (23.1%)**	72 (45.3%)	4 (2.5%)	76 (47.8%)	7 (4.4%)
Agri-value	**20 (2.9%)**	10 (50.0%)	0 (0.0%)	10 (50.0%)	0 (0.0%)
Advanced Technology	**142 (20.7%)**	68 (47.9%)	2 (1.4%)	63 (44.4%)	9 (6.3%)
Forestry	**37 (5.4%)**	**23 (62.2%)**	0 (0.0%)	12 (32.4%)	2 (5.4%)
Mining	**23 (3.3%)**	12 (52.2%)	1 (4.3%)	10 (43.5%)	0 (0.0%)
Oil and Gas	**142 (20.7%)**	64 (45.1%)	1 (0.7%)	65 (45.8%)	**12 (8.5%)**
Financial	**89 (13.0%)**	43 (48.3%)	1 (1.1%)	39 (43.8%)	6 (6.7%)
Other	**75 (10.9%)**	28 (37.3%)	1 (1.3%)	**44 (58.7%)**	2 (2.7%)

- 62.2% of respondents in forestry indicated a positive attitude toward Saskatchewan as a result of viewing the advertising
- 52.2% of respondents in the mining sector indicated a positive attitude as a result of viewing the advertising, followed by agri-value (50.0%), financial (48.3%), advanced technology (47.9%), and general manufacturing (45.3%)

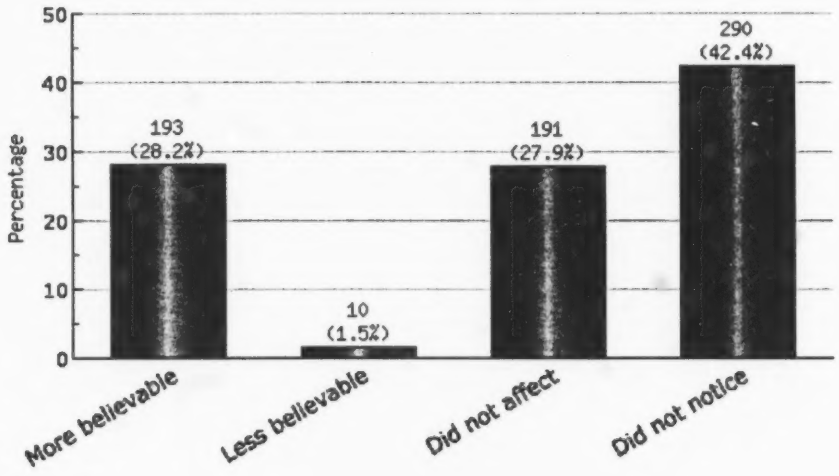
Excluding Saskatchewan Respondents:

"Attitude Towards SK Since Ads" **by** *"Sector"*

	Totals	More positive	More negative	Same	Don't know
Totals	**357 (100%)**	**191 (53.5%)**	**3 (0.8%)**	**140 (39.2%)**	**23 (6.4%)**
General Manufacturing	**67 (18.8%)**	38 (56.7%)	0 (0.0%)	26 (38.8%)	3 (4.5%)
Agrivalue	**6 (1.7%)**	3 (50.0%)	0 (0.0%)	3 (50.0%)	0 (0.0%)
Advanced Technology	**75 (21.0%)**	42 (56.0%)	1 (1.3%)	27 (36.0%)	5 (6.7%)
Forestry	**34 (9.5%)**	**23 (67.6%)**	0 (0.0%)	9 (26.5%)	2 (5.9%)
Mining	**17 (4.8%)**	9 (52.9%)	1 (5.9%)	7 (41.2%)	0 (0.0%)
Oil and Gas	**95 (26.6%)**	45 (47.4%)	1 (1.1%)	42 (44.2%)	7 (7.4%)
Financial	**44 (12.3%)**	23 (52.3%)	0 (0.0%)	15 (34.1%)	**6 (13.6%)**
Other	**19 (5.3%)**	8 (42.1%)	0 (0.0%)	**11 (57.9%)**	0 (0.0%)

- 67.6% of respondents in forestry indicated a positive attitude toward Saskatchewan as a result of viewing the advertising
- 56.7% of respondents in the general manufacturing sector indicated a positive attitude as a result of viewing the advertising, followed by advanced technology (56.0%), mining (52.9%), agrivalue (50%), and oil and gas (47.4%)

2.3.22 The print ads featured testimonials from business executives in various sectors. Did these testimonials make you ...



684 responses

Key Findings:

- 42.4% of respondents indicated not having noticed the print ads featuring business executive testimonials (45.1% excluding SK respondents)
- 28.2% of respondents indicated they were more likely to believe the print ads featuring business executives testimonials (25.6% excluding SK respondents)
- 27.9% of respondents indicated the print ads featuring business executives' testimonials did not affect the believability of the ad (28.2% excluding SK respondents)
- 1.5% of respondents indicated they were less likely to believe the print ads featuring business executives testimonials (1.1% excluding SK respondents)

"Effect of Testimonials" **by** *"Media Type Recall"*

	Totals	More believable	Less believable	Did not affect	Did not notice
Overall Total	**684 (100%)**	**193 (28.2%)**	**10 (1.5%)**	**191 (27.9%)**	**290 (42.4%)**
Newspaper (print)	**258 (37.7%)**	89 (34.5%)	4 (1.6%)	81 (31.4%)	84 (32.6%)
Newspaper (online)	**28 (4.1%)**	**14 (50.0%)**	0 (0.0%)	4 (14.3%)	10 (35.7%)
Television	**384 (56.1%)**	112 (29.2%)	7 (1.8%)	111 (28.9%)	154 (40.1%)
Airport Signage	**69 (10.1%)**	26 (37.7%)	**3 (4.3%)**	18 (26.1%)	22 (31.9%)
Air Canada in-flight service	**34 (5.0%)**	**17 (50.0%)**	1 (2.9%)	10 (29.4%)	6 (17.6%)
Other (please specify)	**132 (19.3%)**	43 (32.6%)	2 (1.5%)	35 (26.5%)	52 (39.4%)
Do not remember	**100 (14.6%)**	21 (21.0%)	0 (0.0%)	**32 (32.0%)**	**47 (47.0%)**

- 34.5% of respondents who saw the newspaper print ads indicated the testimonials made the ad more believable and 31.4% indicated it had no effect

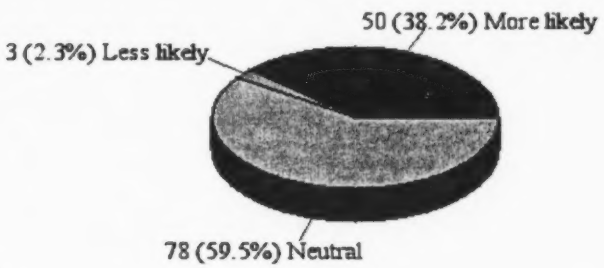
Excluding Saskatchewan Respondents:

"Effect of Testimonials" **by** *"Media Type Recall"*

	Totals	More believable	Less believable	Did not affect	Did not notice
Totals	**355 (100%)**	**91 (25.6%)**	**4 (1.1%)**	**100 (28.2%)**	**160 (45.1%)**
Newspaper (print)	**100 (28.2%)**	31 (31.0%)	1 (1.0%)	29 (29.0%)	39 (39.0%)
Newspaper (online)	**7 (2.0%)**	**3 (42.9%)**	0 (0.0%)	1 (14.3%)	3 (42.9%)
Television	**166 (46.8%)**	39 (23.5%)	**3 (1.8%)**	50 (30.1%)	74 (44.6%)
Airport Signage	**32 (9.0%)**	13 (40.6%)	0 (0.0%)	7 (21.9%)	12 (37.5%)
Air Canada in-flight service	**24 (6.8%)**	10 (41.7%)	0 (0.0%)	**9 (37.5%)**	5 (20.8%)
Other (please specify)	**43 (12.1%)**	13 (30.2%)	0 (0.0%)	12 (27.9%)	18 (41.9%)
Do not remember	**67 (18.9%)**	14 (20.9%)	0 (0.0%)	21 (31.3%)	**32 (47.8%)**

- 31.0% of respondents who saw the newspaper print ads indicated the testimonials made the ad more believable and 29% indicated it had no effect

2.3.23 How has the advertising affected your willingness to do business in Saskatchewan if the opportunity presented itself?



131 responses

Key Findings:

Of the respondents who recalled the advertising and were NOT from Saskatchewan:

- 59.5% indicated a neutral willingness to conduct business in Saskatchewan if the opportunity were presented
- 38.2% indicated their willingness to be more likely to conducting business in Saskatchewan if the opportunity were presented
- 2.3% indicated a less likelihood of conducting business in Saskatchewan if the opportunity were presented

"Since Ads, Consider Business in SK" **by** *"Province"*

	Totals	More likely	Less likely	Neutral
Totals	131 (100%)	50 (38.2%)	3 (2.3%)	78 (59.5%)
British Columbia	58 (44.3%)	24 (41.4%)	3 (5.2%)	31 (53.4%)
Alberta	34 (26.0%)	12 (35.3%)	0 (0.0%)	22 (64.7%)
Saskatchewan	1 (0.8%)	0 (0.0%)	0 (0.0%)	1 (100.0%)
Ontario	38 (29.0%)	14 (36.8%)	0 (0.0%)	24 (63.2%)

- British Columbia indicated a greater likelihood (41.4%)of conducting business in Saskatchewan since seeing the ads, followed by Ontario (36.8%), and Alberta (35.3%)

"Since Ads, Consider Business in SK" **by** *"Sector"*

	Totals	More likely	Less likely	Neutral
Totals	131 (100%)	50 (38.2%)	3 (2.3%)	78 (59.5%)
General Manufacturing	27 (20.6%)	12 (44.4%)	1 (3.7%)	14 (51.9%)
Agri-value	2 (1.5%)	0 (0.0%)	1 (50.0%)	1 (50.0%)
Advanced Technology	29 (22.1%)	15 (51.7%)	0 (0.0%)	14 (48.3%)
Forestry	25 (19.1%)	6 (24.0%)	1 (4.0%)	18 (72.0%)
Mining	9 (6.9%)	4 (44.4%)	0 (0.0%)	5 (55.6%)
Oil and Gas	17 (13.0%)	4 (23.5%)	0 (0.0%)	13 (76.5%)
Financial	17 (13.0%)	9 (52.9%)	0 (0.0%)	8 (47.1%)
Other	5 (3.8%)	0 (0.0%)	0 (0.0%)	5 (100.0%)

- The Financial sector indicated a greater likelihood (52.9%) of conducting business in Saskatchewan if the opportunity were presented followed by Advanced Technology (51.7%), General Manufacturing (44.4%), and Mining (44.4%)
- Respondents in the Oil and gas sector indicated they were neutral (76.5%) to conducting business in Saskatchewan if presented the opportunity, followed by Forestry (72.0%), and General Manufacturing (51.9%), for those sectors with 10 or more respondents

3 Key Findings

3.1 Demographics

- 23.8% of respondents indicated they compete in the General Manufacturing sector (23% excluding SK respondents)
- 21.7% of respondents indicated they compete in the Advanced Technology sector
- 16.0% of respondents indicated they compete in the Oil and Gas sector (16.6% excluding SK respondents)
- 11.2% of respondents indicated they compete in the Financial sector (10.9% excluding SK respondents)
- 10.7% of respondents indicated they compete in an "other" sector (8.9% excluding SK respondents)
- 9.4% of respondents indicated they compete in the Forestry sector (11.1% excluding SK respondents)
- 3.8% of respondents indicated they compete in the Agri-value sector
- 3.4% of respondents indicated they compete in the Mining sector (3.9% excluding SK respondents)

By province, key sectors:

- Of the total British Columbia respondents, the highest proportion were in the general manufacturing (26.8%) and the forestry sectors (22.8%)
- Of the total Alberta respondents, the highest proportion were in the Oil and Gas sector (45.9%)
- Of the total Saskatchewan respondents, the highest proportion were in the General Manufacturing sector (26.9%)
- Of the total Ontario respondents, the highest proportion were in the advanced technology sector (30.3%)

Inter-provincial

- 81.7% of respondents conducted business on an inter-provincial level (83.4% excluding SK respondents)
- 18.3% of respondents did not conduct business on an inter-provincial level (these 366 respondents were excluded from the remainder of the survey with the exception of Saskatchewan respondents) (16.6% excluding SK respondents)

By province, respondents conducting business inter-provincially:

- Three quarters of the Saskatchewan businesses (75.9%) indicated conducting business on an inter-provincial level
- 87.3% of Alberta businesses indicated conducting business on an inter-provincial level
- 81.7% of Ontario businesses indicated conducting business on an inter-provincial level
- 81.3% of British Columbia businesses indicated conducting business on an inter-provincial level

By sector, respondents conducting business inter-provincially:

- The Agri-value sector had the highest proportion of respondents conducting business on an inter-provincial level (92.1%), followed by General Manufacturing (88.9%), Oil and Gas (87.6%), and Advanced Technology (87.6%)
- Respondents in the "other" sectors had the highest proportion of respondents NOT conducting business on an inter-provincial level (37.2%), followed by forestry (34.1%), and financial (26.2%)

Excluding Saskatchewan Respondents:

- The agri-value sector had the highest proportion of respondents conducting business on an inter-provincial level (93.2%), followed by advanced technology (92.3%), oil and gas (90.3%), and general manufacturing (89.5%)
- Respondents in the "other" sectors had the highest proportion of respondents NOT conducting business on an inter-provincial level (41.6%), followed by forestry (34.1%), and financial (22.2%)

Number of Employees

- 66.1% of respondents have more than 20 employees in their company (73.3% excluding SK respondents)
- 14.7% of respondents have between 10 and 20 employees (15.3% excluding SK respondents)
- 13.6% of respondents have less than 10 employees in their company (6.3% excluding SK respondents)

Total number employees, by province:

- 82.4% of respondents in Alberta were in companies of more than 20 employees
- 69.1% of respondents in British Columbia were in companies of more than 20 employees
- 67.5% of respondents in Ontario were in companies of more than 20 employees
- 45.8% of respondents in Saskatchewan were in companies of more than 20 employees

Total number employees, by sector:

- Companies in the financial sector accounted for the highest proportion of respondents in the 500 or more category (18.1%)
- The mining sector accounted for highest proportion of companies with more than 20 employees (77.2%), followed by Oil and Gas (76.2), forestry (70.2), and General Manufacturing (70.3%).
- The Agri-value sector accounted for highest proportion of companies with between 1 and 20 employees (61.1%) followed by the Advanced Technology sector (34.2%) and the "other" sector (37.5%)

Excluding Saskatchewan Respondents:

- Companies in the financial sector accounted for the highest proportion of respondents in the 500 or more category (21.2%)
- The oil and gas sector accounted for highest proportion of companies with more than 20 employees (84.2%), followed by Mining (83.6), Financial (79.6%), and General Manufacturing (76.1%)
- The agri-value sector accounted for highest proportion of companies with between 1 and 20 employees (56.3%) followed by the advanced technology sector (28%) and the forestry sector (25.6%)

3.2 Provinces currently/considering doing business in

By province, provinces currently doing business in:

- 75.5% of Alberta respondents indicated doing business in Saskatchewan
- 41.4% of British Columbia respondents indicated doing business with Saskatchewan
- 36.8% of Ontario respondents indicated doing business with Saskatchewan
- The province of Ontario had the highest proportion of respondents currently doing business in Manitoba (52.3%), Quebec (64.7%), Nova Scotia (41.1%), New Brunswick (35.8%), Newfoundland (30.5%), Prince Edward Island (27.7%), and Nunavut (16.5%)
- The province of Alberta had the highest proportion of respondents currently doing business in the Northwest Territories (27.0%)
- The province of British Columbia had the highest proportion of respondents currently doing business in the Yukon (18.7%)

By sector, provinces currently doing business in:

- Ontario and Alberta contained the highest proportion of Agri-value business (72.9%)
- British Columbia contained the highest proportion of Forestry business (81.8%)
- Alberta contained the highest proportion of Oil and Gas business (89.6%)

Excluding Saskatchewan Respondents:

- Ontario and Alberta contained the highest proportion of Agri-value business with 83.0% and 69.8% respectively
- British Columbia contained the highest proportion of Forestry business (86.7%)
- Alberta contained the highest proportion of Oil and Gas business (98.3%)

Provinces currently doing business in:

- The respondents rated Saskatchewan the second most desirable province to do business with. A total of 27.7% of respondents rated Saskatchewan as a province they would consider doing business with
- This result was second only to Alberta in which 35.7% of respondents indicated they were interested in doing business in Alberta
- British Columbia was considered by 25.5% of total respondents that are not currently doing business there, followed by 24.8% of respondents that indicated Manitoba

By province, provinces considering doing business in Saskatchewan:

- 18.3% of respondents from Ontario indicated they would consider doing business in Saskatchewan
- 15.7% of respondents from British Columbia indicated they would consider doing business in Saskatchewan
- 10.9% of respondents from Alberta indicated they would consider doing business in Saskatchewan

By sector, provinces considering doing business in Saskatchewan:

- The sectors with the highest proportion of respondents indicating they would consider Saskatchewan to do business in include Advanced Technology (16.2%), Forestry (14.0%), and General Manufacturing (12.3%)

Excluding Saskatchewan Respondents:

- The sectors with the highest proportion of respondents indicating they would consider Saskatchewan to do business in include advanced technology (21.9%), general manufacturing (17.1%), and forestry (14.2%)

3.3 Provincial Advertising

- 17.6% of the total respondents indicated hearing or seeing advertising that promotes doing business in Saskatchewan (10.8% excluding SK respondents)
- 16.6% of total respondents indicated hearing or seeing advertising that promotes doing business in Ontario (17.6% excluding SK respondents)
- 16.4% of total respondents indicated hearing or seeing advertising that promotes doing business in Alberta (15.3% excluding SK respondents)
- 12.0% of total respondents indicated hearing or seeing advertising that promotes doing business in British Columbia (14.1% excluding SK respondents)
- 60.4% of total respondents did not recall seeing or hearing any advertising that promotes doing business in any of the Canadian provinces (64.4% excluding SK respondents)

By province, provinces having seen advertising for:

- 19.3% of respondents in Alberta recalled hearing or seeing Saskatchewan advertising, this is followed by 7.3% of British Columbia respondents and 5.4% of Ontario respondents
- 19.8% of respondents in Saskatchewan recalled hearing or seeing Alberta advertising, followed by 16.1% of respondents in British Columbia who recall hearing or seeing Alberta advertising and 7.8% of respondents in Ontario who recall hearing or seeing Alberta advertising

By sector, provinces having seen advertising for:

- 24% of the respondents in the oil and gas sector recalled Saskatchewan advertising
- 21.3% of respondents in the financial sector recalled Saskatchewan advertising
- 19.1% of respondents in the agri-value sector recalled Saskatchewan advertising
- 17.0% of respondents in the mining sector recalled Saskatchewan advertising
- 15.9% of respondents in the general manufacturing sector recalled Saskatchewan advertising

  Excluding Saskatchewan Respondents:

  - 20% of the respondents in the oil and gas sector recalled Saskatchewan advertising
  - 11.6% of respondents in the financial sector recalled Saskatchewan advertising
  - 10.6% of respondents in the mining sector recalled Saskatchewan advertising
  - 8.1% of respondents in the general manufacturing sector recalled Saskatchewan advertising
  - 7.8% of respondents in the agri-value sector recalled Saskatchewan advertising

By province, respondents wanting to learn more about that province:

- 36.1% of the respondents that had seen or heard advertising that promotes doing business in Saskatchewan, were interested in learning more about or considering doing business in Saskatchewan (22.2% excluding SK respondents)

- 31.6% of the respondents that had seen or heard advertising that promotes doing business in Alberta, were interested in learning more about or considering doing business in Alberta (29.8% excluding SK respondents)
- 39.8% of respondents in Alberta were interested in learning more about or considering doing business in Saskatchewan
- 12.9% of respondents in British Columbia were interested in learning more about or considering doing business in Saskatchewan
- 11.2% of respondents in Ontario were interested in learning more about or considering doing business in Saskatchewan

By sector, respondents wanting to learn more about that province:

- Over half of the respondents (52.7%) in the oil and gas sector were interested in learning more or considering doing business with Saskatchewan, followed by the financial sector (44.7%), other (40%), and advanced technology (36.9%)

Excluding Saskatchewan Respondents:

- 42.1% in the oil and gas sector were interested in learning more or considering doing business with Saskatchewan, followed by the advanced technology sector (22.4%), forestry (20%), and financial (19%)

3.4 Saskatchewan Experience

- 23.4% of respondents have visited Saskatchewan for pleasure
- 8.2% of respondents have visited Saskatchewan for business
- 19.3% of respondents have visited Saskatchewan for both pleasure and business
- 49.1% of respondents have never visited Saskatchewan for business or pleasure

By province, respondents who have visited Saskatchewan:

- 15.8% of respondents from Ontario visited Saskatchewan for business (includes responses classified as both)
- 19% of respondents from Ontario visited Saskatchewan for pleasure (includes responses classified as both)
- 45.5% of respondents from Alberta visited Saskatchewan for business (includes responses classified as both)
- 68.9% of respondents from Alberta visited Saskatchewan for pleasure(includes responses classified as both)
- 20.6% of respondents from BC visited Saskatchewan for business (includes responses classified as both)
- 39.4% of respondents from BC visited Saskatchewan for pleasure (includes responses classified as both)

By sector, respondents who have visited Saskatchewan:

- The agri-value sector contained the highest proportion of respondents (excluding the other category) who visited Saskatchewan for work related reasons (13.7%)

3.5 Perceptions of Saskatchewan Prior to Aided Recall

Saskatchewan is dependent on a farm-based economy

- 64.8% of respondents agreed that Saskatchewan is dependent on a farm-based economy (67.3% excluding Saskatchewan respondents)
- 25% of respondents were neutral that Saskatchewan is dependent on a farm-based economy (25.1% excluding Saskatchewan respondents)
- 10.1% of respondents disagreed that Saskatchewan is dependent on a farm-based economy (7.6% excluding Saskatchewan respondents)

Saskatchewan's economy is dependent on natural resources

- 52.6% of respondents agreed that Saskatchewan's economy is dependent on natural resources (50% excluding Saskatchewan respondents)
- 37.4% of respondents were neutral that Saskatchewan's economy is dependent on natural resources (39.4% excluding Saskatchewan respondents)
- 10% of respondents disagreed that that Saskatchewan's economy is dependent on natural resources (10.5% excluding Saskatchewan respondents)

Saskatchewan is a leader in technology and innovation

- 14.5% of respondents agreed that Saskatchewan is a leader in technology and innovation (4.9% excluding Saskatchewan respondents)
- 44.9% of respondents were neutral that Saskatchewan is a leader in technology and innovation (48.7% excluding Saskatchewan respondents)
- 40.6% of respondents disagreed that Saskatchewan is a leader in technology and innovation (46.4% excluding Saskatchewan respondents)

Saskatchewan is diversifying its economy

- 37.3% of respondents agreed that Saskatchewan is diversifying its economy (32.3% excluding Saskatchewan respondents)
- 49.0% of respondents were neutral that Saskatchewan is diversifying its economy (55.2% excluding Saskatchewan respondents)
- 13.7% of respondents disagreed that Saskatchewan is diversifying its economy (12.5% excluding Saskatchewan respondents)

Saskatchewan has a skilled and educated workforce

- 44.0% of respondents agreed that Saskatchewan has a skilled and educated workforce (37.1% excluding Saskatchewan respondents)
- 46.7% of respondents were neutral that Saskatchewan has a skilled and educated workforce (54.8% excluding Saskatchewan respondents)
- 9.2% of respondents disagreed that Saskatchewan has a skilled and educated workforce(8.2% excluding Saskatchewan respondents)

By province, level of agreement with statements about Saskatchewan:

- The view that *Saskatchewan is dependent on a farm based economy* was highest on average among Ontario and British Columbia respondents with an agreement rating of 3.8 out of 5. This view was the lowest among Saskatchewan respondents with a rating of 3.6 out of 5.
- The view that *Saskatchewan's economy is dependent on natural resources* was highest on average among Saskatchewan respondents with an agreement rating of 3.7 out of 5. The remaining provinces indicated a rating of 3.5 out of 5.

- The view that *Saskatchewan is a leader in technology and innovation* was highest on average among Saskatchewan respondents with an agreement rating of 3.2 out of 5. This view was the lowest among Ontario respondents with a rating of 2.4 out of 5.
- The view that *Saskatchewan is diversifying its economy* was highest on average among Saskatchewan respondents with an agreement rating of 3.4 out of 5. This view was the lowest among Alberta and Ontario respondents with a rating of 3.2 out of 5.
- The view that *Saskatchewan has a skilled and educated workforce* was highest on average among Saskatchewan respondents with an agreement rating of 3.7 out of 5. This view was the lowest among Ontario and British Columbia respondents with a rating of 3.3 out of 5.

3.6 Aided Recall

- 31.8% of respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan (18.9% excluding Saskatchewan respondents)

By province, respondents who recall any Saskatchewan advertising (unaided):

- 68.7% of Saskatchewan respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan
- 30.1% of Alberta respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan
- 15% of British Columbia respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan
- 11.2% of Ontario respondents recalled hearing or seeing advertising that promotes doing business in Saskatchewan

3.7 Tagline Recall

- 28.2% of total respondents recalled the slogan "Saskatchewan - Our Future is Wide Open" (14.3% excluding SK respondents)

By province, respondents who recall the "Saskatchewan - Our Future is Wide Open" campaign:

- 67.7% of Saskatchewan respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"
- 22.7% of Alberta respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"
- 12.1% of British Columbia respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"
- 7.9% of Ontario respondents recalled the slogan "Saskatchewan - Our Future is Wide Open"

3.8 Recall with a Brief Description

- Of the respondents who did not recall the advertising promoting business in Saskatchewan (aided) or the slogan, 92.9% still did not recall the advertisements after a brief description

3.9 Aided, Unaided and Combined Recall

- Unaided Recall - 18% recall advertisements promoting Saskatchewan. Responses to the question: "*Have you recently heard or seen any advertising that promotes doing business in any of the following provinces*?" (11% excluding SK respondents)
- Aided Recall = respondents that recalled the tagline OR recalled the aided question: "Over the past few months, do you recall hearing or seeing any advertising that promotes doing business in Saskatchewan?" PLUS respondents that recalled the ad after a brief description. Overall, aided recall is 25% and by province, British Columbia is 18%, Alberta is 24%, Saskatchewan is 43%, and Ontario is 15%. (11% excluding SK respondents).
- Combined Recall – 43% recall the advertising (30% excluding SK respondents). By province, combined recall is 25% of British Columbia respondents, 44% of Alberta respondents, 81% of Saskatchewan respondents, and 20% of Ontario respondents.

3.10 Media

Of the respondents who recalled the advertising:

- 54.6% indicated they saw the ad on television (46.6% excluding SK respondents)
- 37% indicated newspaper (print) (28.3% excluding SK respondents)
- 19.6% indicated other (12% excluding SK respondents)
- 9.8% indicated airport signage (9% excluding SK respondents)
- 4.9% indicated the in-flight video (6.8% excluding SK respondents)
- 3.9% indicated newspaper (online) (1.9% excluding SK respondents)
- 16.1% of respondents were not sure where they saw the advertising (19.6% excluding SK respondents)

By province, recall of advertising in media type:

- Of the 102 respondents in British Columbia that saw or heard the advertisement, 39.2% indicated the television
- Of the 183 respondents in Alberta that saw or heard the advertisement, 49.2% indicated the television
- Of the 82 respondents in Ontario that saw or heard the advertisement, 50% indicated the television
- Saskatchewan had the highest proportion of respondents who recalled the advertising in newspaper (46.1%), newspaper online (6.0%), television (63.0%), and other (27.5%)
- Alberta respondents had the highest proportion of respondents recalling the airport signage (10.9%)
- British Columbia respondents had the highest proportion of respondents recalling Air Canada in-flight service advertisement (12.7%)

Frequency of Ads

- 38.6% of respondents recalling the Saskatchewan advertising saw the ad 1 to 3 times (62.3% excluding SK respondents)
- 26.8% of respondents recalling the Saskatchewan advertising saw the ad 4 to 10 times (23.2% excluding SK respondents)

- 25.6% of respondents recalling the Saskatchewan advertising saw the ad at least 10 times (3.4% excluding SK respondents)

By province, respondent frequency of seeing/hearing the advertisements:

- Respondents from British Columbia recalled seeing the advertisement the least with 70.4% indicating between 1 to 3 times
- Saskatchewan respondents recalled seeing the advertisement the most with 47.4% indicating at least 10 times
- 32.9% of Alberta respondents saw the ad at least 4 times
- 26.9% of Ontario respondents saw the ad at least 4 times
- 77.7% of Saskatchewan respondents saw the ad at least 4 times

3.11 Globe and Mail Supplement

- 18.4% of respondents indicated seeing the special supplement on Saskatchewan in the Globe and Mail in May (26.5% excluding SK respondents)
- Ontario respondents were the most likely to recall the supplement (45.5%), followed by Alberta (21.6%), and British Columbia (20.7%)

3.12 Advertising Messages

- Of the respondents who recalled the advertising, the top three messages respondents believed that the advertising was trying to convey include:
  - Saskatchewan is a great place to do business (66.5%)
    (64.6% excluding SK respondents)
  - Saskatchewan is a great place to live (63.6%)
    (53.3% excluding SK respondents)
  - Saskatchewan is rich in natural resources (33.8%)
    (31.2% excluding SK respondents)

By province, top three messages ads were believed to convey:

- Of the four provinces surveyed, a higher proportion of respondents in British Columbia indicated work ethic (16.0%), innovation (13.0%), and advanced technology (10.0%)
- Of the four provinces surveyed, a higher proportion of respondents in Saskatchewan indicated a great place to live(74.8%), a great place to do business (68.5%), and rich in natural resources (36.6)
- Of the four provinces surveyed, a higher proportion of respondents in Ontario indicated skilled workforce (18.3%), and agrarian economy (7.3%)

3.13 New Learning

- Of the respondents who recalled the advertising, 22.4% indicated learning something new about Saskatchewan (25.6% excluding SK respondents)
- By province, 31.0% of British Columbia respondents indicated learning something new about Saskatchewan, followed by Ontario (24.4%), and Alberta (23.2%)
- 30% of the Agri-value companies surveyed (6 respondents) indicating learning something new, followed by Advanced Technology (27.6%), and Forestry (26.3%)

Excluding Saskatchewan Respondents:

- 50% of the Agri-value companies surveyed (3 respondents) indicated learning something new, followed by other (36.8%), Advanced Technology (32.1%), and Forestry (29.4%)

Of the respondents who recalled the advertising:

- 26.4% of respondents indicated that the advertising piqued their interest to learn more about Saskatchewan (27.8% excluding SK respondents)
- By province, respondents from Ontario are the most interested (30.5%) in learning more about Saskatchewan, followed by Alberta respondents (29.8%)

By sector, advertising piques interest:

- Those respondents in the Agri-value sector (35%) indicated the most interest in learning more about Saskatchewan, followed by the Oil and Gas sector (31.7%) and the Advanced Technology sector (31.0%).

Excluding Saskatchewan Respondents:

- Those respondents in the Agri-value sector (50%) indicated the most interest in learning more about Saskatchewan, followed by the Oil and Gas sector (34.7%) and the Forestry sector (29.4%)

3.14 Perception after Recall Questions

Saskatchewan is a good place to live:

- 68.6% of respondents agree or strongly agree with the statement Saskatchewan is a good place to live (52.3% excluding Saskatchewan respondents)
- 23.3% of respondents are undecided in regards to the statement Saskatchewan is a good place to live (33.9% excluding Saskatchewan respondents)
- 8.2% of respondents disagree or strongly disagree with the statement Saskatchewan is a good place to live (13.7% excluding Saskatchewan respondents)

Saskatchewan is a good place to do business:

- 58.0% of respondents agree or strongly agree with the statement Saskatchewan is a good place to do business (54.6% excluding Saskatchewan respondents)
- 32.0% of respondents are undecided in regards to the statement Saskatchewan is a good place to do business (38.1% excluding Saskatchewan respondents)
- 10.0% of respondents disagree or strongly disagree with the statement Saskatchewan is a good place to do business (7.3% excluding Saskatchewan respondents)

Saskatchewan is rich in natural resources:

- 83.6% of respondents agree or strongly agree with the statement Saskatchewan is rich in natural resources (76.8% excluding Saskatchewan respondents)
- 15.1% of respondents are undecided in regards to the statement Saskatchewan is rich in natural resources (22.1% excluding Saskatchewan respondents)
- 1.3% of respondents disagree or strongly disagree with the statement Saskatchewan is rich in natural resources (1.1% excluding Saskatchewan respondents)

Saskatchewan workers have a great attitude and strong work ethic:

- 61.2% of respondents agree or strongly agree with the statement Saskatchewan workers have a great attitude and strong work ethic (53.5% excluding Saskatchewan respondents)
- 33.9% of respondents are undecided in regards to the statement Saskatchewan workers have a great attitude and strong work ethic (42.6% excluding Saskatchewan respondents)
- 5.0% of respondents disagree or strongly disagree with the statement Saskatchewan workers have a great attitude and strong work ethic (3.9% excluding Saskatchewan respondents)

Saskatchewan has an educated and skilled workforce:

- 61.4% of respondents agree or strongly agree with the statement Saskatchewan has an educated and skilled workforce (54.9% excluding Saskatchewan respondents)
- 33.6% of respondents are undecided in regards to the statement Saskatchewan has an educated and skilled workforce (40.3% excluding Saskatchewan respondents)
- 5.1% of respondents disagree or strongly disagree with the statement Saskatchewan has an educated and skilled workforce (4.8% excluding Saskatchewan respondents)

Saskatchewan has a diverse economy:

- 59.9% of respondents agree or strongly agree with the statement Saskatchewan has a diverse economy (53% excluding Saskatchewan respondents)
- 30.1% of respondents are undecided in regards to the statement Saskatchewan has a diverse economy (35.6% excluding Saskatchewan respondents)
- 10.1% of respondents disagree or strongly disagree with the statement Saskatchewan has a diverse economy (11.5% excluding Saskatchewan respondents)

Saskatchewan is an innovative and vibrant business environment:

- 48.0% of respondents agree or strongly agree with the statement Saskatchewan is an innovative and vibrant business environment (43.4% excluding Saskatchewan respondents)
- 37.6% of respondents are undecided in regards to the statement Saskatchewan is an innovative and vibrant business environment (43.7% excluding Saskatchewan respondents)
- 14.4% of respondents disagree or strongly disagree with the statement Saskatchewan is an innovative and vibrant business environment (12.9% excluding Saskatchewan respondents)

Saskatchewan is a province with advanced technologies:

- 50.4% of respondents agree or strongly agree with the statement Saskatchewan is a province with advanced technologies (39.2% excluding Saskatchewan respondents)
- 37.5% of respondents are undecided with the statement Saskatchewan is a province with advanced technologies (44.8% excluding Saskatchewan respondents)
- 12.0% of respondents disagree or strongly disagree with the statement Saskatchewan is a province with advanced technologies (15.9% excluding Saskatchewan respondents)

Saskatchewan is predominantly an agrarian economy:

- 47.1% of respondents agree or strongly agree with the statement Saskatchewan is predominantly an agrarian economy (49.9% excluding Saskatchewan respondents)
- 37.5% of respondents are undecided in regards to the statement Saskatchewan is predominantly an agrarian economy (35.6% excluding Saskatchewan respondents)
- 15.4% of respondents disagree or strongly disagree with the statement Saskatchewan is predominantly an agrarian economy (14.6% excluding Saskatchewan respondents)

By province, level of agreement with statements about Saskatchewan:

- Saskatchewan respondents agreed the most (4.3) with the statement *Saskatchewan is a good place to live*, followed by Ontario (3.6), Alberta (3.5) and British Columbia (3.3)
- Saskatchewan respondents agree the most (3.7) with the statement *Saskatchewan is a good place to do business*, followed by Ontario (3.6) and Alberta (3.6) and British Columbia (3.5)
- Saskatchewan respondents agree the most (4.3) with the statement *Saskatchewan is rich in natural resources*, followed by Ontario (4.1), Alberta (4.0) and British Columbia (4.0)
- Saskatchewan respondents agree the most (3.8) with the statement *Saskatchewan workers have a great attitude and strong work ethic*, followed by Ontario (3.6), Alberta (3.6) and British Columbia (3.6)
- Saskatchewan respondents agree the most (3.8) with the statement *Saskatchewan has an educated and skilled workforce*, followed by Alberta (3.6), Ontario (3.5) and British Columbia (3.5)
- Saskatchewan respondents agree the most (3.8) with the statement *Saskatchewan has a diverse economy*, followed by Alberta (3.5), British Columbia (3.5), and Ontario (3.4)
- Agreement with the statement *Saskatchewan is an innovative and vibrant business environment* was the same for respondents in Saskatchewan (3.4) and British Columbia (3.4), followed by Alberta (3.3), and Ontario (3.3)
- Saskatchewan respondents agree the most (3.7) with the statement *Saskatchewan is a province with advanced technologies*, followed by Alberta (3.3), British Columbia (3.2), and Ontario (3.1)
- Agreement with the statement *Saskatchewan is predominantly an agrarian economy* was greatest in Ontario (3.6), followed by Alberta (3.4), Saskatchewan (3.4) and British Columbia (3.3)

3.15 Attitude Change

Of the respondents who recalled the advertising:

- 46.6% of respondents indicated a more positive attitude towards Saskatchewan as a result of viewing the advertising (53.5% excluding SK respondents)
- 46.4% of respondents indicated their attitude remained the same after viewing the advertising (39.2% excluding SK respondents)
- 1.5% indicated their attitude became more negative as a result of viewing the advertising (0.8% excluding SK respondents)

By province, attitude towards Saskatchewan since seeing ads:

- 62.0% of Ontario respondents indicated their attitude towards Saskatchewan become more positive as a result of viewing the advertising

- 53.5% of British Columbia respondents indicated their attitude become more positive towards Saskatchewan as a result of viewing the advertising, followed by 49.7% of Alberta respondents, and 39.1% of Saskatchewan respondents

By sector, attitude towards Saskatchewan since seeing ads:

- 62.2% of respondents in Forestry indicated a positive attitude toward Saskatchewan as a result of viewing the advertising
- 52.2% of respondents in the mining sector indicated a positive attitude as a result of viewing the advertising, followed by Agri-value (50.0%), Financial (48.3%), Advanced Technology (47.9%), and General Manufacturing (45.3%)

  Excluding Saskatchewan Respondents:

  - 67.6% of respondents in forestry indicated a positive attitude toward Saskatchewan as a result of viewing the advertising
  - 56.7% of respondents in the general manufacturing sector indicated a positive attitude as a result of viewing the advertising, followed by Advanced Technology (56.0%), Mining (52.9%), Agrivalue (50%), and Oil and Gas (47.4%)

3.16 Testimonials

- 42.4% of respondents indicated not having noticed the print ads featuring business executive testimonials (45.1% excluding SK respondents)
- 28.2% of respondents indicated they were more likely to believe the print ads featuring business executives testimonials (25.6% excluding SK respondents)
- 27.9% of respondents indicated the print ads featuring business executives' testimonials did not affect the believability of the ad (28.2% excluding SK respondents)
- 1.5% of respondents indicated they were less likely to believe the print ads featuring business executives testimonials (1.1% excluding SK respondents)

By media type, effect of testimonials on ads:

- 34.5% of respondents who saw the newspaper print ads indicated the testimonials made the ad more believable and 31.4% indicated it had no effect
- Excluding Saskatchewan Respondents:
  - 31.0% of respondents who saw the newspaper print ads indicated the testimonials made the ad more believable and 29% indicated it had no effect

3.17 Impact

Of the respondents who recalled the advertising and were NOT from Saskatchewan:

- 59.5% indicated a neutral willingness to conduct business in Saskatchewan if the opportunity were presented
- 38.2% indicated a greater willingness to conduct business in Saskatchewan if the opportunity were presented
- 2.3% indicated a lesser likelihood of conducting business in Saskatchewan if the opportunity were presented

By province, likelihood to do business in SK since seeing ads:

- British Columbia indicated a greater liikelihood (41.4%) of conducting business in Saskatchewan since seeing the ads,, followed by Ontario (36.8%), and Alberta (35.3%)

By sector, likelihood to do business in SK since seeing ads:

- The financial sector indicated a greater likelihood (52.9%) of conducting business in Saskatchewan if the opportunity were presented followed by Advanced Technology (51.7%), General Manufacturing (44.4%), and Mining (44.4%)